



Electronic Research Administration  
*A program of the National Institutes of Health*

# **Extramural Trainee Reporting and Career Tracking (xTRACT) User Guide**

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**December 09, 2016**



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## DOCUMENT HISTORY

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Date	System Version	Document Version	Description of Change	Author
10/16/2015	1.0.0	1.0.0	Initial publication	eRA Communications
05/13/2016	1.04.01	2.0.0	Updated for new user interface - see <a href="#">Latest Updates</a> topic in the xTRACT online help	eRA Communications
12/08/2016	1.2.0.9	2.0.1	Updated RTD copy and Copy On-Demand features available for initiated, revised, and renewal RPPRs	eRA Communications

The most current version of this document will be available on the eRA web site: <http://era.nih.gov>.

**IMPORTANT:** Did you know the information in this user guide is available as online help, too? Access the xTRACT Online Help directly at <https://era.nih.gov/erahelp/xTract/> or click the '?' icon anywhere within xTRACT for help specific to that screen.

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## 1 What is xTRACT?

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Extramural Trainee Reporting and Career Tracking (xTRACT) is a module within eRA Commons used by applicants, grantees, and assistants to create research training tables for inclusion in progress reports and institutional training grant applications.

Because xTRACT is integrated with Commons it is able to pre-populate some training data for training tables and reports by using xTrain appointment and related data. This includes trainee names, selected characteristics, institutions, grant numbers, and subsequent NIH and other HHS awards. xTRACT also allows the manual entry of data, for information not found in Commons or xTrain. This manually entered information is stored in xTRACT and can be re-used when preparing subsequent training table submissions.

If you are a Signing Official (SO), Administrative Official (AO), Business Official (BO), Principal Investigator (PI), or assistant (ASST) in Commons, you have access to the xTRACT module.

**IMPORTANT:** xTRACT is a tool for creating training tables. Tables generated in xTRACT must be attached to and submitted with the appropriate progress report or application. There is no *Submit* feature in xTRACT.

POLICY: Guide Notice [NOT-OD-16-007](http://grants.nih.gov/grants/guide/notice-files/NOT-OD-16-007.html) (<http://grants.nih.gov/grants/guide/notice-files/NOT-OD-16-007.html>)

## 2 Initiate an RTD for New Application

---

**IMPORTANT:** Only the Principal Investigator (PI) can initiate an RTD for a new application.

To initiate an RTD for a new application:

1. Select the **New Applications** tab.
2. Select the **Initiate RTD for New Application** link.
3. Enter the fields as displayed on the Prepare New Research Training Dataset (RTD) screen.  
Required fields are marked with an asterisk (\*).
  - **Project Title** (required)
  - **Description**
  - **FOA**
  - **Institution** (required)
4. Select the **Save** button.

The screenshot displays the xTRACT web application interface. At the top, a navigation bar includes links for Home, Admin, Institution Profile, Personal Profile, Status, Prior Approval, RPPR, Internet Assisted Review, xTrain, xTRACT, Admin Supp, and eRA Partners. Below this, a secondary navigation bar shows xTRACT Info, New Applications, Training Grants, Persons, and Institution Data. The 'New Applications' dropdown menu is open, highlighting 'Initiate RTD for New Application'. The main content area is titled 'Prepare New Research Training Dataset (RTD)' and contains a 'Basic Information' section. This section lists required fields: Project Title (with an input box), Description (with a text area), FOA (with an input box), and Institution (pre-filled with 'UNIVERSITY OF ROCHESTER'). At the bottom of the form are 'Save' and 'Clear' buttons. A 'Back to search results' link is located in the top right corner of the form area.

**NOTE:** If a user with the ASST role is initiating the RTD, they will see additional drop-down fields used to select the contact PI and, in cases where the PI has multiple affiliates, an *Institution* field to select the appropriate institution.

---

Home Admin Institution Profile Personal Profile Status Prior Approval RPPR Internet Assisted Review xTrain xTRACT Admin Supp eRA Partners

xTRACT Info New Applications Training Grants Persons Institution Data

New Applications ▾

Search RTD for New Applications

Initiate RTD for New Application

Prepare New Research Training Dataset (RTD) ⓘ

Back to search results

Basic Information ⓘ

★ Required Fields

★ Project Title

Description

FOA

PI

★ Institution

Save Clear

User with ASST role will have additional drop-down fields to select the contact PI and Institution (if the PI is associated with more than one institution).

You will see a message at the top of the screen confirming that your RTD has been initiated.

### 3 Search RTD for New Applications

---

To search for RTDs for new applications:

1. Navigate to the **New Applications** tab.
2. Select the **Search RTD for New Applications** link to display search parameters.
3. Enter search parameters to narrow the results.
  - **New Data Set Identifier**
  - **PD/PI Last Name**
  - **New Data Set Project Title**

---

**Tip:** You can use the percent sign (%) as a wild card at the start, end, and middle of your criteria.

---

4. Select the **Search New RTDs** button.

The screenshot displays the xTRACT web application interface. At the top, a navigation bar includes links: Home, Admin, Institution Profile, Personal Profile, Status, Prior Approval, RPPR, Internet Assisted Review, xTrain, xTRACT, Admin Supp, and eRA Partners. Below this, a secondary navigation bar shows: xTRACT Info, New Applications (selected), Training Grants, Persons, and Institution Data. On the left, a sidebar under 'New Applications' contains two links: 'Search RTD for New Applications' (highlighted with a red circle) and 'Initiate RTD for New Application'. The main content area is titled 'Search Research Training Data Sets for New Applications' with a help icon. It features three input fields: 'New Data Set Identifier', 'PD/PI Last Name', and 'New Data Set Project Title'. Below these fields is a text hint: 'You can perform a wildcard search by using the "%" character, for example: abcd% or %abcd% or ab%cd%'. At the bottom of the form are two buttons: 'Search New RTDs' and 'Clear'. Below the form, the text 'New RTDs' is displayed, followed by 'Nothing found to display.'

New RTDs display in a table on the screen. If no matches are found, the following message appears: *Nothing found to display.*

The information presented in the results includes:

- New Data Set Identifier
- Project Title
- PD/PI Name
- Status
- Action links

[Home](#)
[Admin](#)
[Institution Profile](#)
[Personal Profile](#)
[Status](#)
[Prior Approval](#)
[RPPR](#)
[Internet Assisted Review](#)
[XTrain](#)
[xTRACT](#)
[Admin Supp](#)
[eRA Partners](#)

[xTRACT Info](#)
[New Applications](#)
[Training Grants](#)
[Persons](#)
[Institution Data](#)

New Applications ▾

[Search RTD for New Applications](#)

[Initiate RTD for New Application](#)

## Search Research Training Data Sets for New Applications

New Data Set Identifier

PD/PI Last Name

New Data Set Project Title

You can perform a wildcard search by using the "%" character, for example: abcd% or %abcd% or ab%cd%

Search New RTDs

Clear

### New RTDs

Showing 1 - 3 of total

New Data Set Identifier ^	Project Title	PD/PI Name	Status	Action
1026	Sample of New Project_ Sample of New Project_ Sample of New Project Sample of New Project_ Sample of New Project_ Sample of New Project_ Sample of New Project_ Sample of New Project_ Sample of New Project_ Sample of New Pro	SHORTS, JIM	In Progress	<a href="#">Prepare RTD for New Application</a>
15668	Awesome New Training Program	SHORTS, JIM	Final	<a href="#">View Training Tables</a> <a href="#">Unfinalize New Application</a>
17323	New App for Testing XTRACT-425	SHORTS, JIM	Final	<a href="#">View Training Tables</a> <a href="#">Unfinalize New Application</a>

- **Prepare RTD for New Application**

- **View Training Tables**

Use this link to view the training tables for a New Application. The link is available once the RTD has been marked as Final.

- **Unfinalize New Application**

This link is available to users (PD/PIs and their ASSTs) with the permission to unfinalize an RTD that has been marked as Final.



## 4 Search for Training Grants

---

Use the *Search for Training Grants* feature to prepare RTDs for use in revisions and renewals or in Research Performance Progress Reports (RPPR).

1. Select the **Training Grants** tab.

The *Search for Training Grants* screen displays with search parameters for **Grant Number** and **PD/PI Last Name**.

For an ASST, an additional search criterion of *Delegator* also appears. This allows the ASST to filter results to a specific PI who has delegated access to them. This is a drop-down which defaults to blank, but includes the names of all PIs who have delegated access to the ASST.

2. *Optional*: Enter the appropriate search parameters. This is not required.

### Grant Number

- **Type**
- **Activity Code**

T32 is the default value.

- **IC Code**
- **Serial Number**
- **Support Year**
- **Suffix**

**PD/PI Last Name:** Enter the last name of the PD/PI associated with the project.

---

**Tip:** You may use the percent sign (%) as a wild card at the start, at the end, or in the middle of your criteria.

---

3. Select the **Search Training Grants** button.

Home Admin Institution Profile Personal Profile Status Prior Approval RPPR Internet Assisted Review xTrain xTRACT Admin Supp eRA Partners

xTRACT Info New Applications Training Grants Persons Institution Data

Training Grants ▾

Search Training Grants

### Search for Training Grants to work on or view Research Training Datasets (RTDs) ⓘ

**Grant Number**

Type Activity Code IC Code Serial Number Support Year Suffix

T32

PD/PI Last Name

You can perform a wildcard search by using the "%" character, for example: abcd% or %abcd% or ab%cd%

Search Training Grants Clear

All records matching the entered search criteria (if any) display in the hit list below the search criteria. These records are limited by the privileges associated with your account. If no programs meet the entered criteria, the following message displays: *Nothing found to display.*

Home Admin Institution Profile Personal Profile Status Prior Approval RPPR Internet Assisted Review xTrain xTRACT Admin Supp eRA Partners

xTRACT Info New Applications Training Grants Persons Institution Data

Training Grants ▾

Search Training Grants

### Search for Training Grants to work on or view Research Training Datasets (RTDs) ⓘ

**Grant Number**

Type Activity Code IC Code Serial Number Support Year Suffix

Select All

PD/PI Last Name

Shorts

You can perform a wildcard search by using the "%" character, for example: abcd% or %abcd% or ab%cd%

Search Training Grants Clear

Showing 1 - 2 of total 2

Grant Number	Grant Status	PI Name	Project Title	RTD Status	Action
5R25GM999999-12	Pending	Shorts, Jim	Resource in Education in Microbiology and Immunology	In Progress (RPPR)	<a href="#">Continue for RPPR</a>
5T32AI999999-29	Pending	Shorts, Jim	Predoctoral Training Program in Immunology	In Progress (RPPR)	<a href="#">Continue for RPPR</a>

The training grants are presented in a table and include the following related information:

- **Grant Number**
- **Grant Status**
- **PI Name**
- **Project Title**
- **Status**
- **Action**

The **Action** column presents the options to perform several tasks. These tasks are limited to the role associated to your account. You may see all or some of the following links:

- **Prepare for RPPR**

Use this link to prepare the RTD for the progress report. The link appears when the training grant is awarded, the next support year is pending, and RTD preparation for the RPPR has not been initiated.

- **Continue for RPPR**

Use this link to continue an RTD already in progress. The link appears when the RTD for the progress report has been initialized but is not final.

- **Prepare for Revision**

Use this link to prepare the RTD for a revision. The link appears when the training grant is awarded and an RTD preparation for a revision has not been initiated.

- **Continue for Revision**

Use this link to continue an RTD already in progress. The link appears when the RTD for a revision has been initialized but is not final.

- **Prepare for Renewal**

Use this link to prepare the RTD for a renewal. The link appears when the training grant is awarded, has entered or will soon be entering its final noncompeting year, and an RTD preparation for a renewal has not been initiated.

- **Continue for Renewal**

Use this link to continue an RTD already in progress. The link appears when the RTD for a renewal has been initiated but is not final.

- **View Tables**

Use this link to view the training tables for an RPPR, Revision, or Renewal. The link is available once the RTD has been marked as final.

- **Unfinalize**

This link is available to users having the permission to unfinalize an RTD for an RPPR, Revision, or Renewal that has been marked as Final.

## 5 Prepare RTD for a New Application

Use the links listed under **RTD** on the left side of the screen to maintain the specific sections of the RTD:

- **Basic Information**
- **Participating Departments/Programs**
- **Training Support & Summary**
- **Participating Faculty**
- **Participating Students**
- **Applicants and Entrants**
- **Preview PDF**
- **Finalize RTD**

Selecting the links above opens the specific section of the RTD. From within, you can add, edit, and/or remove data.

The screenshot displays the 'Prepare Research Training Dataset (RTD) for New Application' interface. On the left, a sidebar contains a menu with a red box highlighting the 'RTD' section, which includes links for 'Basic Information', 'Participating Departments / Programs', 'Training Support & Summary', 'Participating Faculty', 'Participating Students', 'Applicants and Entrants', 'Preview PDF', and 'Finalize RTD'. The main content area is titled 'Basic Information' and contains several fields: 'New RTD' with the value '492 The Effects of Workload on Post Docs', 'PD/PI' with the value 'Shorts, Jim', and 'Project Title' with the value 'The Effects of Workload on Post Docs'. There is also a section for 'PI(s)' with an 'Add PI' button and a table for 'PI Name' and '(Contact)' information. The table has two columns: 'PI Name' and '(Contact)'. The first row shows 'Shorts, Jim' in the '(Contact)' column.

PI Name	(Contact)
	Shorts, Jim

## **5.1 Basic Information (New Application)**

The Basic Information section includes:

- **New Data Set Identifier** (read only)
- **Project Title**
- **PI(s)**

Added PIs are read only. Use the **Add PI** button to include additional PIs. Links are also available for removing a PI and setting the PI as the Contact. Refer to the steps below.

- **Description**

The optional description field is provided so that you can add a meaningful description of the purpose of the RTD. This information is used only within xTRACT and is not part of the data submitted with the training grant application.

- **FOA**

For informational purposes only. There are no restrictions for submitting an RTD based on the FOA.

- **Institution** (read only)

Update the fields as appropriate and select the **Save** button.

Home Admin Institution Profile Personal Profile Status Prior Approval RPPR Internet Assisted Review xTrain xTRACT Admin Supp eRA Partners

xTRACT Info New Applications Training Grants Persons Institution Data

New Applications ▾

Search RTD for New Applications

Initiate RTD for New Application

RTD ▾

Basic Information

Participating Departments / Programs

Training Support & Summary

Participating Faculty

Participating Students

Applicants and Entrants

Preview PDF

Finalize RTD

Prepare Research Training Dataset (RTD) for New Application

New RTD

492 The Effects of Workload on Post Docs

PD/PI

Shorts, Jim

Back to search results

Basic Information ⓘ

★ Required Fields

New Data Set Identifier 492

★ Project Title

The Effects of Workload on Post Docs

PI(s)

Add PI

Showing 1 - 1 of total 1

PI Name	Actions
(Contact) Shorts, Jim	

Description

We are testing to see the effects of workload on post docs.

FOA

PAR-12-345

★ Institution UNIVERSITY OF ROCHESTER

Save Clear

### 5.1.1 Add PI

To add a PI from a search:

1. Select the **Add PI** button.

The screenshot shows the xTRACT web application interface. The top navigation bar includes links for Home, Admin, Institution Profile, Personal Profile, Status, Prior Approval, RPPR, Internet Assisted Review, xTrain, xTRACT, Admin Supp, and eRA Partners. The left sidebar contains a 'New Applications' menu with options like 'Search RTD for New Applications' and 'Initiate RTD for New Application', and an 'RTD' menu with options like 'Basic Information', 'Participating Departments / Programs', 'Training Support & Summary', 'Participating Faculty', 'Participating Students', 'Applicants and Entrants', 'Preview PDF', and 'Finalize RTD'. The main content area is titled 'Prepare Research Training Dataset (RTD) for New Application'. It shows 'New RTD' as '492 The Effects of Workload on Post Docs' and 'PD/PI' as 'Shorts, Jim'. Below this is a 'Basic Information' section with 'Required Fields' and 'New Data Set Identifier 492'. The 'Project Title' field contains 'The Effects of Workload on Post Docs'. The 'PI(s)' field has an 'Add PI' button highlighted with a red circle. Below this is a table showing 'Showing 1 - 1 of total 1' with one entry: '(Contact) Shorts, Jim'. The 'Description' field contains 'We are testing to see the effects of workload on post docs.' The 'FOA' field contains 'PAR-12-345'. The 'Institution' field contains 'UNIVERSITY OF ROCHESTER'. At the bottom are 'Save' and 'Clear' buttons.

2. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the check mark from the box titled **Search for persons who have a Commons affiliation with my institution**.

**NOTE:** You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

3. All matching records display in the **Person(s)** table. Only persons with a Commons role of PI will be returned in the search. Select the **Add PI** link in the **Action** to add the person.



### Search for Persons

Search Criteria

\* Either Commons User ID or Person ID or Last Name is required to perform person search.

\* Commons User ID

\* Person ID

First Name

Middle Name

\* Last Name

☒ Search for persons who have a Commons affiliation with my institution

You can perform a wildcard search on Commons ID or Last Name, by using the "%" character.  
For example: abcd% or %abcd% or ab%cd%

Search Persons

Clear

Close

**Search for Persons**

Search Criteria

Search Results

**Persons**

Showing 1 - 1 of total 1

Filter:

Show 10 per page

Person Name	Commons User ID	Person ID	Commons Institution	Email	Action
HOPE, BOB	HOPEB	1234567	UNIVERSITY OF ROCHESTER	eRATest@mail.nih.gov	Add PI

Looking for a Person but don't see that person listed? You can [create a new xTRACT person record here](#).

Close

- Repeat the steps to add other PIs. Added PIs appear in the Person(s) list with the word *Added* shown in the **Action** column.
- Use the **Close** button to close the search screen.

### 5.1.2 Set as Contact

If your application has multiple PIs, you can set a PI as the Contact. From the **Basic Information** section of the RTD, find the PI you wish to set as Contact. Select the **Set as Contact** link.

### 5.1.3 Remove a PI

Use the **(remove)** link located next to a PI's name in the **Basic Information** section of the RTD to remove that PI from the record. This link only appears if multiple PIs exist and the link only appears for PI's **other** than the contact PI.

Select **OK** to confirm the removal when prompted.

## 5.2 Participating Departments and Programs (New Application)

Use this section to add/remove departments and programs.

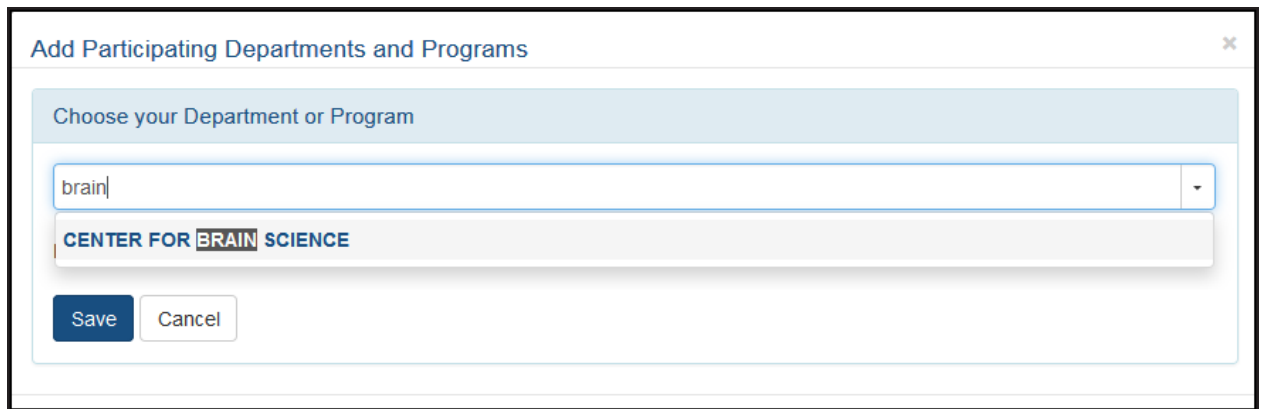
### 5.2.1 Add Departments

1. Select Participating **Departments/Programs** on the left.
2. Select the **Add Participating Departments or Programs** button.

The screenshot shows the xTRACT web application interface. At the top, there is a navigation bar with links to U.S. Department of Health & Human Services, NIH, National Institutes of Health, Office of Extramural Research, and a user profile for Arivis Tarkheena. Below this is the eRA logo and the text 'Electronic Research Administration A program of the National Institutes of Health'. A main navigation bar contains links to Home, Admin, Institution Profile, Personal Profile, Status, ASSIST, Prior Approval, RPPR, Internet Assisted Review, xTrain, xTRACT, Admin Supp, eRA Partners, and Non-Research. A sub-navigation bar for xTRACT includes xTRACT Info, New Applications, Training Grants, Persons, and Institution Data. On the left, under 'New Applications -', there are links for 'Search RTD for New Applications' and 'Initiate RTD for New Application'. Below that, under 'RTD -', there is a list of links: 'Basic Information', 'Participating Departments / Programs' (highlighted with a red box), 'Training Support & Summary', 'Participating Faculty', 'Participating Students', 'Applicants and Entrants', 'Preview PDF', and 'Finalize RTD'. On the right, under 'Prepare Research Training Dataset (RTD) for New Application', there is a table with two rows: 'New RTD' with the value '1029 cognitive studies' and 'PD/PI' with the value 'TARKHEENA, ARIVIS'. Below this table is the section 'Participating Departments and Programs' with a red box around the 'Add Participating Departments or Programs' button. A message states: 'Participating Departments and Programs have not been added to the RTD yet and are needed to prepare the RTD for a new application.' Below the message is a table with three columns: 'Department or Program Name', 'Type', and 'Actions'.

The screenshot shows a modal window titled 'Add Participating Departments and Programs'. It has a close button in the top right corner. Inside the modal, there is a section titled 'Choose your Department or Program' with a dropdown menu showing 'Select...'. Below the dropdown, there is a message: 'Looking for a Program but don't see it listed? You can also [create one](#).' At the bottom of the modal, there are two buttons: 'Save' and 'Cancel'.

3. Start typing in the text box. The system will display a list of departments and programs with that character string in a drop-down menu.



4. Find the appropriate department in the results list drop-down and select the appropriate department. Major Components are also displayed with the Department to differentiate among departments with the same name in different units of the organization.

create one.' At the bottom of the dialog are two buttons: 'Save' (blue) and 'Cancel' (white)." data-bbox="163 399 936 591"/>

5. Click on the **Save** button to complete the selection and close the screen.

The *Participating Departments and Programs* screen updates to show the added department(s) in a table. Added programs and departments display in the same table. The **Actions** column includes links for removing and editing the programs and departments.

## 5.2.2 Add Programs

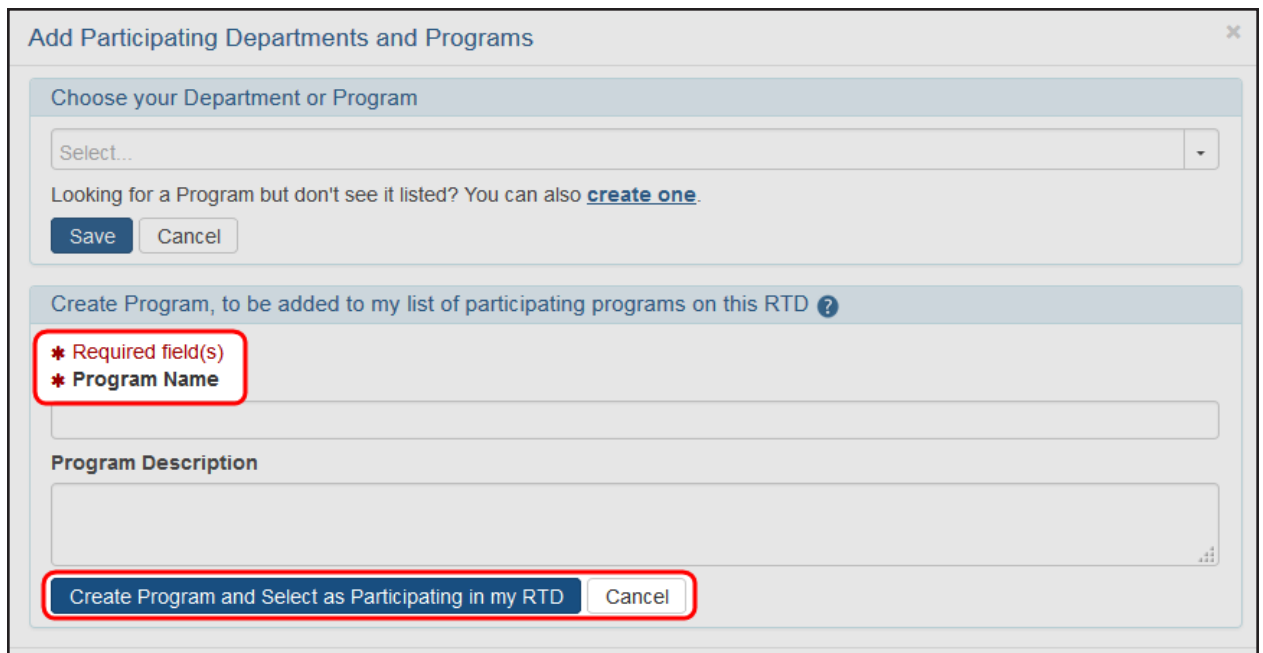
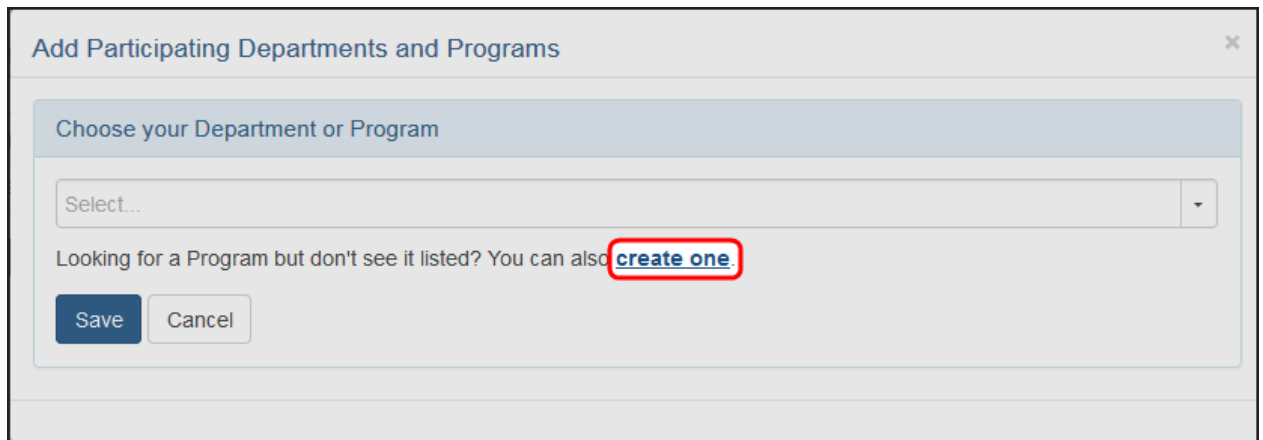
1. Select the **Add Participating Departments or Programs** button.

The screenshot shows the xTRACT web application interface. At the top, there is a navigation bar with links for U.S. Department of Health & Human Services, NIH, National Institutes of Health, Office of Extramural Research, and a user profile for Arivis Tarkheena. Below this is the eRA logo and the text 'Electronic Research Administration, A program of the National Institutes of Health'. A main navigation bar contains links for Home, Admin, Institution Profile, Personal Profile, Status, ASSIST, Prior Approval, RPPR, Internet Assisted Review, xTrain, xTRACT, Admin Supp, eRA Partners, and Non-Research. A secondary navigation bar includes xTRACT Info, New Applications, Training Grants, Persons, and Institution Data. On the left, a sidebar menu lists options under 'New Applications' (Search RTD for New Applications, Initiate RTD for New Application) and 'RTD' (Basic Information, Participating Departments / Programs, Training Support & Summary, Participating Faculty, Participating Students, Applicants and Entrants, Preview PDF, Finalize RTD). The 'Participating Departments / Programs' option is highlighted with a red box. The main content area is titled 'Participating Departments and Programs' and features a button 'Add Participating Departments or Programs' also highlighted with a red box. Below the button, a message states: 'Participating Departments and Programs have not been added to the RTD yet and are needed to prepare the RTD for a new application.' A table with columns 'Department or Program Name', 'Type', and 'Actions' is partially visible.

2. Start typing in the text box. The system will display a list of departments and programs with that character string in a drop-down menu.
3. Find the appropriate program in the results list drop-down and select the appropriate program.

The **Action** column updates to show *Added* for the added program. You can repeat the step to **Add Program** for as many programs as necessary.

To add a Program not available in the search results, select **Create One**. Add **Program Name** (required) and **Program Description** (optional) and select **Create Program and Select as Participating in my RTD**.

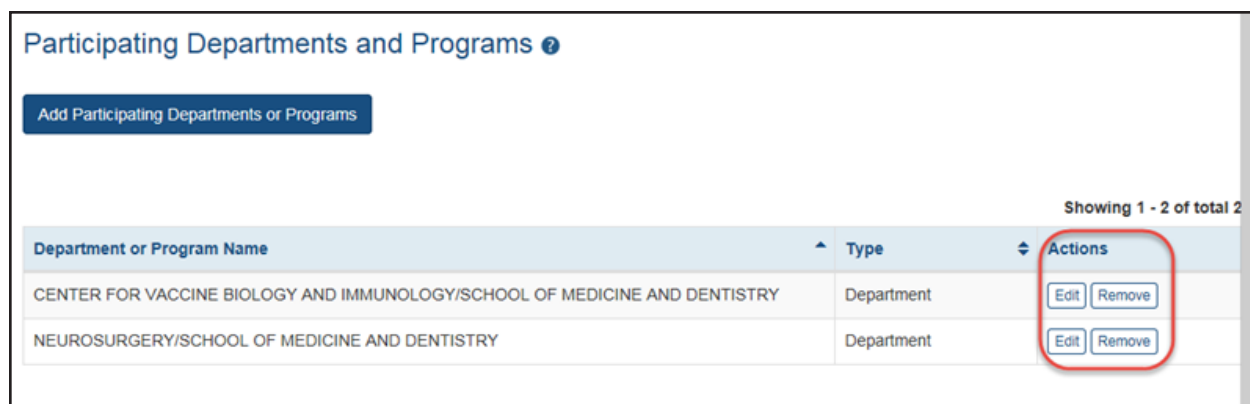


4. Click the **Create Program and Select as Participating in my RTD** button to add the program to the list of selected departments/programs. Then click the **Save** button to add this newly-defined program to your RTD.

The *Participating Departments and Programs* screen updates to show the added program(s) in a table. Added programs and departments display in the same table. The **Actions** column includes links for removing and editing the programs and departments.

### 5.2.3 Edit Departments & Programs

To edit a program or department, select the **Edit** button from the **Actions** column.



Participating Departments and Programs ⓘ

Add Participating Departments or Programs

Showing 1 - 2 of total 2

Department or Program Name	Type	Actions
CENTER FOR VACCINE BIOLOGY AND IMMUNOLOGY/SCHOOL OF MEDICINE AND DENTISTRY	Department	<a href="#">Edit</a> <a href="#">Remove</a>
NEUROSURGERY/SCHOOL OF MEDICINE AND DENTISTRY	Department	<a href="#">Edit</a> <a href="#">Remove</a>

Click on the **Edit** button in the **Actions** column, for any participating program or department, in order to update Census data as necessary.

### Faculty

- Total
- Participating

### Predotorates

- Total
- Supported by any HHS Training Award
- Students with Participating Faculty
- Eligible Students with Participating Faculty

### Postdoctorates

- Total
- Supported by any HHS Training Award
- Postdocs with Participating Faculty
- Eligible Postdocs with Participating Faculty

Home

Admin

Institution Profile

Personal Profile

Status

Prior Approval

RPPR

Internet Assisted Review

xTrain

xTRACT

Admin Supp

eRA Partners

xTRACT Info

New Applications

Training Grants

Persons

Institution Data

New Applications ▾

Search RTD for New Applications

Initiate RTD for New Application

RTD ▾

Basic Information

Participating Departments / Programs

Training Support & Summary

Participating Faculty

Participating Students

Applicants and Entrants

Preview PDF

Finalize RTD

Prepare Research Training Dataset (RTD) for New Application

New RTD

492 The Effects of Workload on Post Docs

PD/PI

Shorts, Jim (Contact)

Participating Department/Program Detail ⓘ

NEUROSURGERY/SCHOOL OF MEDICINE AND DENTISTRY

Census

Faculty

Total

0

Participating

0

Predotorates

Participating

0

Supported by any HHS Training Award

0

Students with Participating Faculty

0

Eligible Students with Participating Faculty

0

Postdoctorates

Total

0

Supported by any HHS Training Award

0

Postdocs with Participating Faculty

0

Eligible Postdocs with Participating Faculty

0

Save and Close

Clear

Select the **Save and Close** button to save the information.

## 5.3 Training Support & Summary (New Application)

### 5.3.0.1 Summary Statistics

Displays the read-only totals of the following:



- Average Grant Support per Participating Faculty Member
- Total Number of Predoc Positions
- Total Number of Postdoc Positions
- Total Number of Short-Term Positions

The **Average Grant Support per Participating Faculty Member** is the mean of the Current Year Direct Costs in Research Support for each Faculty member.

The total number of positions represent the sums of the positions entered for each Institution Training Grant.

Prepare Research Training Dataset (RTD) for New Application

New RTD

419 The Effects of Romulan Ale on Senior Staff

PD/PI

Bond, James

Training Support & Summary

Summary Statistics

Average Grant Support per Participating Faculty Member

\$30,906

Total Number of Predoc Positions

0

Total Number of Postdoc Positions

0

Total Number of Short-Term Positions

0

Institutional Training Support Detail

NIH Sources of Support

Showing 1 - 1 of total 1

Grant Title	Award Number	Project Period	PD/PI	Action
Predctoral Training Program in Immunology	T32A1999999-28	09/1986 to 06/2018	No, Dr., Whiplash, Snidely, Rabbit, Roger	<div>EditRemove</div>

Add Institutional Training Support

Census Totals

### 5.3.1 Institutional Training Support

To add currently active, federal institutional training, career development, or research education support available to the participating faculty members:

1. Select the **Add Institutional Training Support** button in the **Institutional Training Support Detail** section.

**Training Support & Summary** ⓘ

Summary Statistics

Institutional Training Support Detail

NIH Sources of Support

Showing 1 - 1 of total 1

Grant Title	Award Number	Project Period	PD/PI	Action
Integrative Immunology Training Program	T32AI999999-37	07/1980 to 05/2019		<a href="#">Edit</a> <a href="#">Remove</a>

**Add Institutional Training Support**

Census Totals

2. Search for support by entering any of the criteria on the *Add Institutional Training Support* pop-up. You must enter either an IC Code or PD/PI Last Name.
  - Activity Code
  - IC Code
  - Serial Number
  - Suffix Code
  - Start Date
  - End Date
  - PD/PI Last Name
  - Institution

---

**Tip:** As you type an institution name, a drop-down list of potential matches will begin to populate. Select the institution from that list.

---

3. Select the **Search Funding Sources** button.

The screenshot shows a web application window titled "Add Institutional Training Support". Inside, there is a section titled "Search NIH Funding Sources". Below this title is a "Search Criteria" section with several input fields: "Activity Code", "IC Code" (marked with a red asterisk), "Serial Number", "Suffix Code", "Start Date (mm/dd/yyyy)", "End Date (mm/dd/yyyy)", "PD/PI Last Name" (marked with a red asterisk), and "Institution". At the bottom of the search criteria section are three buttons: "Search Funding Sources" (highlighted with a red circle), "Clear", and "Cancel". A "Close" button is located in the bottom right corner of the window.

4. From the result list, click the **Select** link from the **Action** column for the correct project.

The added source of support will display on the *Training Support and Summary* screen.

Use the **Edit** and **Remove** links next to the record to update or remove the funding source as necessary.

Additional detail can be found in the [Institutional Training Support Detail](#) section.

### 5.3.2 Census Totals

Displays totals for Faculty, Predoctorates, and Postdoctorates.

#### Faculty

- Total
- Participating

Use the **Edit** button to add to or update the numbers for unique faculty members across participating departments and interdepartmental programs.

#### Predoc

The following read-only information is displayed. This data is maintained on the **Participating Departments/Programs** section, and the sum totals across **Participating Programs and Departments** are shown here.

- Total
- Supported by any HHS Training Award
- Total Predoctorates with Participating Faculty
- Eligible Students with Participating Faculty
- TGE Predocs Supported by this Training Grant
- Predocs Supported by this Training Grant (R90 Only)

### **Postdoc**

The following read-only information is displayed. This data is maintained on the **Participating Departments/Programs** section, and the sum totals across **Participating Programs and Departments** are shown here.

- Total
- Supported by any HHS Training Award
- Total Postdoctorates with Participating Faculty
- Eligible Postdocs with Participating Faculty
- TGE Postdocs Supported by this Training Grant
- Postdocs Supported by this Training Grant (R90 Only)

### **5.3.3 Institutional Training Support Detail (New Application)**

Select the **Edit** link on the **Institutional Training Support** section of the *Training Support & Summary* to open the *Editing* screen.

Institutional Training Support Detail ?

Project Title:

Preddoctoral Training Program in Immunology

Grant Number:

T32A999999-01A1

Number of Trainee Positions

Number of Predoc Positions

0

Number of Postdoc Positions

0

Number of Short-Term Positions

0

Number of Participating Faculty

0

Edit

Overlapping Faculty

Number of Overlapping Faculty

1

Showing 1 - 1 of total 1

Overlapping Faculty Name

Hope, Bob

Action

Remove

Add Overlapping Faculty

### 5.3.4 Number of Trainee Positions

Use this section to add the number of Predoc, Postdoc, Short-term trainee positions, and Participating Faculty positions.

1. Select the **Edit** button.
2. In the *Institutional Training Support* pop up, enter the appropriate totals.
3. Click the **Save** button.

### 5.3.5 Overlapping Faculty

Use this section to update the names and number of overlapping faculty.

1. Select the **Add Overlapping Faculty** button.

Overlapping Faculty

Number of Overlapping Faculty 1

Showing 1 - 1 of total 1

Overlapping Faculty Name	Action
Hope, Bob	<button>Remove</button>

Add Overlapping Faculty

2. In the **Action** column, select **Add Overlapping Faculty** for any participating faculty members that are also on the Institution Training Grant. If a needed faculty member does not display in the results, then add the faculty member as Participating Faculty as described in the topic titled *Refer to the section of this document titled Participating Faculty Members (New Application) on Page 29* for new applications.

The **Action** column updates with the word *Added*.

Add Overlapping Faculty

Person Name	Commons User ID	Person ID	Email	Action
White, Snow	WHITES	1234567	eRATest@mail.nih.gov	<button>Add Overlapping Faculty</button>
Black, Jack	BLACKJ	2345678	eRATest@mail.nih.gov	<button>Add Overlapping Faculty</button>
Smith, Black	SMITHB	3456789	eRATest@mail.nih.gov	<button>Add Overlapping Faculty</button>
Smith, Blue	SMITHBL	4567890	eRATest@mail.nih.gov	<button>Add Overlapping Faculty</button>
Light, Bud	LIGHTB	5678901	eRATest@mail.nih.gov	<button>Add Overlapping Faculty</button>
Crosby, Bing	CROSBYB	6789012	eRATest@mail.nih.gov	<button>Add Overlapping Faculty</button>
Thomas, Danny	THOMASD	7890123	eRATest@mail.nih.gov	<button>Add Overlapping Faculty</button>
Thomas, Marlo	THOMASM	8901234	eRATest@mail.nih.gov	<span>✓Added</span>

Close

3. Select the **Close** button.

The Overlapping Faculty Name displays on the *Institutional Training Support Detail* screen with the option to **Remove** the overlapping faculty member. The updated total count of the overlapping faculty is calculated by system and is displayed as read-only.

## 5.4 Participating Faculty Members (New Application)

Displays the participating faculty added to the RTD - or a message indicating that no faculty have been added, when appropriate.

Person Name	Commons User ID	Person ID	Email	Action
White, Snow	WHITESNOW	1234567	eRATest@mail.nih.gov	<a href="#">Edit</a> <a href="#">Remove</a>
White, Grumpy	WHITEGRUMPY	2345678	eRATest@mail.nih.gov	<a href="#">Edit</a> <a href="#">Remove</a>
White, Doc	WHITEDOC	3456789	eRATest@mail.nih.gov	<a href="#">Edit</a> <a href="#">Remove</a>
White, Sleepy	WHITESLEEPY	4567890	eRATest@mail.nih.gov	<a href="#">Edit</a> <a href="#">Remove</a>
White, Happy	WHITEHAPPY	5678901	eRATest@mail.nih.gov	<a href="#">Edit</a> <a href="#">Remove</a>
White, Bashful	WHITEBASHFUL	6789012	eRATest@mail.nih.gov	<a href="#">Edit</a> <a href="#">Remove</a>

### 5.4.1 Add Faculty

To add faculty, select the **Add Faculty** button.

1. Use the parameters on the *Search for Person(s)* window to find the faculty member. To look outside your institution, uncheck the box titled **Search for persons who have a Commons affiliation with my institution**.

**NOTE:** You must enter a Commons ID, Person ID, or Last Name to perform a search.

2. Select the **Search Persons** button.

Search for Faculty

Search Criteria

★ Either Commons User ID or Person ID or Last Name is required to perform person search.

★ Commons User ID

★ Person ID

First Name

Middle Name

★ Last Name

☒ Search for persons who have a Commons affiliation with my institution

You can perform a wildcard search on Commons ID or Last Name, by using the "%" character.  
For example: abcd% or %abcd% or ab%cd%.

Search Persons

Clear

Close

- All matching records display in the **Person(s)** table. Select the **Add Faculty** button to add the person to the list of faculty for this student.

When the **Add Faculty** button is clicked, the **Action** column will display the word *Added*.

Search for Faculty

Search Criteria

Search Results

Persons

Showing 1 - 2 of total 2

Filter:

Show 10 per page < 1 >

Person Name	Commons User ID	Person ID	Commons Institution	Email	Action
Shorts, Bill	SHORTSB	1234567	UNIVERSITY OF ROCHESTER	eRATest@mail.nih.gov	✓Added
Shorts, Jim	SHORTSJ	7654321	UNIVERSITY OF ROCHESTER	eRATest@mail.nih.gov	Add Faculty

Looking for a Person but don't see that person listed? You can [create a new xTRACT person record here](#).

Close



4. Search for and add other faculty as necessary, repeating the steps above.
5. Use the **Close** button to close the search screen when finished.

### 5.4.2 Edit Faculty

Use the **Edit** link in the **Actions** column to edit the participating faculty detail for the selected member. Refer to the topic titled *Participating Faculty Detail (New Application)* on Page 31.

### 5.4.3 Remove

Select the **Remove** link in the **Actions** column to remove the faculty member from the RTD. At the confirmation, select **Yes**.

### 5.4.4 Participating Faculty Detail (New Application)

Use the + plus icon next to each individual sections of the *Participating Faculty Detail*. The **Open All Sections** link reveals all collapsed sections at once.

Prepare Research Training Dataset (RTD) for New Application

New RTD

419 The Effects of Romulan Ale on Senior Staff

PD/PI

Light, Bud

Participating Faculty Detail ?

Babcock, Lynn

+ Open All Sections

Faculty Member Data

Commons User ID:

WHITESNOW

Email:

eRATest@mail.nih.gov

Rank:

Primary Department or Program:

Research Interest:

Training Role(s):

Edit

+ Faculty Degree

+ Research Support

+ Mentoring Record

Each section provides a means for editing the information. Refer to the steps below.

#### 5.4.4.1 Faculty Member Data

Use the + plus icon in the **Faculty Member Data** panel of the *Participating Faculty Detail* to display faculty data as described below.

- **Commons User ID** (read only)
- **Email** (read only)
- **Rank**
- **Primary Department or Program**

- **Research Interest**
- **Training Role(s)**

Use the **Edit** button to open the fields in a pop-up for editing. Select **Save** to save your changes.

#### **5.4.4.2 Faculty Degree**

From this panel, you may add a degree, edit a degree, or select a degree to add to an RTD.

The **Source** of degrees is displayed as read-only and as either; *xTRACT* (meaning that the degree was added to the person profile in xTRACT); or as *Commons Profile* (meaning that the degree is from the Commons Personal Profile of the person).

##### **Add a Degree**

1. Select the **Add Degree** button.
2. Update the fields in the *Add a Degree* pop-up:
  - **Degree:** Select from the list
  - **Other Degree Text:** Enter if the Degree selected is *OTH* (*other type of degree*) or an other category like *BOTH*, *DDOT*, *DOTH*, *MDOT*, *MOTH*, and *VDOT*.
  - **Degree Date:** Enter in MM/YYYY format
  - **Terminal Degree:** Select the **Yes** or **No** radio button as appropriate. When the **Yes** button is selected, the terminal degree indicator (*This is the terminal degree of this person.*) displays next to the degree details in the view. Only one degree for a person can be set as the Terminal Degree.
  - **Degree Status:** *Completed* or *In Progress* are the selections available for Faculty degrees.
  - **Include in RTD:** Yes or No are the options available.
  - **Degree Institution:** Enter the institution name, one institution per degree. Start typing in some of the institution's name and a drop-down menu displays with related institution names.
3. Select the **Save** button to save your changes.
4. Repeat for any additional degrees.

##### **Edit a Degree**

1. Use the **Edit** button next to a listed degree to display the *Edit a Degree* pop-up for editing.
2. Update the fields as necessary.
3. Select the **Save** button or click the **Cancel** button.

#### **Include in RTD**

1. Locate the degree you are including in the RTD.
2. Check the **Include in RTD** box for the degree to be displayed in the **Participating Faculty Members Training Table** on the RTD PDF.

Uncheck the box to exclude the degree.

#### **Delete a Degree**

Select the **Delete** button to delete the degree from the participating faculty detail. Delete degree is not available if the **Source** of the degree is *Commons Profile*, meaning the degree is from the Commons Personal Profile of the person.

#### **5.4.4.3 Research Support**

##### **NIH and Other Sources of Support on Record**

Includes the NIH Grant number, Role on Project or Subproject, Project Title, Project Period, and Current Year Direct Costs. This information is displayed as read-only.

##### **Other Sources of Support**

Includes Funding Source, Support Type, Project Number, Project Role, Project Title, Project Period, and Current Year Direct Costs.

To add additional support:

1. Select the **Add Another Source of Support** button to display fields for searching/editing to add a non-NIH funding source.
2. Search for a funding source:
  - a. Search for support entering the parameters given and selecting **Search Funding Sources** button.
  - b. From the result list, click the **Select** link from the **Action** column for the correct project.
3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
4. Enter current year direct costs.
5. Select **Save**.

Use the **Edit** and **Remove** links in the **Action** column to update or remove the funding source as necessary.

#### **5.4.4.4 Mentoring Record**

Use the + plus icon in the **Mentoring Record** panel of the *Participating Faculty Detail* to display counts of trainees mentored.

- Predocs In Training
- Predocs Graduated
- Predocs Continued in Research or Related Careers
- Postdocs in Training
- Postdocs Completed Training
- Postdocs Continued in Research or Related Careers

Use the **Edit** button to open the fields in a pop-up for editing. Save your changes by selecting the **Save** button on the pop-up.

## 5.5 Participating Students (New Application)

This section displays the students added to the RTD - or a message indicating that none has been added, when appropriate. From this screen, you can add, edit, and remove students.

**Prepare Research Training Dataset (RTD) for New Application**

**New RTD** 419 The Effects of Romulan Ale on Senior Staff

**PD/PI** Beach, Sandy

**Students** ⓘ

[Add Student](#)

Showing 1 - 1 of total 1

Person Name	Commons User ID	Person ID	Student Type	Action
TEMPLE, SHIRLEY	TEMPLES	1234567	Pre-doc	<a href="#">Edit</a> <a href="#">Remove</a>

Students(s) are listed in a table at the bottom of the screen along with the following information:

- **Student Name**
- **Commons User ID** (if available)
- **Person ID**
- **Student Type**: Pre-doc or Post-doc

- **Actions**

- The **Edit** link opens the *Student Detail* for the selected student. Refer to the topic titled *Student Detail (New Application)* on Page 38.
- The **Remove** link removes the person from the RTD.

The **Add Student** feature allows you to search for and add students or create new xTRACT persons to add to the RTD.

### 5.5.1 Add Student

To add a student:

1. Select the **Add Student** button.
2. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled **Search for persons who have a Commons affiliation with my institution**.

---

**NOTE:** You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

---

3. All matching records display in the **Person(s)** table. Select the **Add Student as** link in the **Action** column to add the person.

---

**NOTE:** *If you are unable to find the person you wish to add by doing a search*, you may use the **Create a new xTRACT Person here** link to create an xTRACT person record. Refer to the topic titled *Create xTRACT Person on Page 184*

---

4. Select the **Student Type** from the pop-up box.
5. Repeat to add other students. Added students appear in the **Person(s)** list with the word *Added* shown in the **Action** column.
6. Use the **Close** button to close the search screen.

Search for Students

Search Criteria

★ Either Commons User ID or Person ID or Last Name is required to perform person search.

★ Commons User ID

★ Person ID

First Name

Middle Name

★ Last Name

☒ Search for persons who have a Commons affiliation with my institution

You can perform a wildcard search on Commons ID or Last Name, by using the "%" character.  
 For example: abcd% or %abcd% or ab%cd%.

Search Persons

Clear

Close

Search for Students

Search Criteria

Search Results

Persons

Filter:

Showing 1 - 2 of total 2

Show

10

per page

« 1 »

Person Name	Commons User ID	Person ID	Commons Institution	Email	Action
Bond, James	BONDJ	1234567	UNIVERSITY OF ROCHESTER	eRATest@mail.nih.gov	Add Student as ▼
Bond, Secure	BONDS	7654321	UNIVERSITY OF ROCHESTER	eRATest@mail.nih.gov	✓Added

Looking for a Person but don't see that person listed? You can [create a new xTRACT person record here.](#)

Close

## 5.5.2 Edit Student

From the list of students, select the **Edit** link in the **Actions** column to edit the student detail.

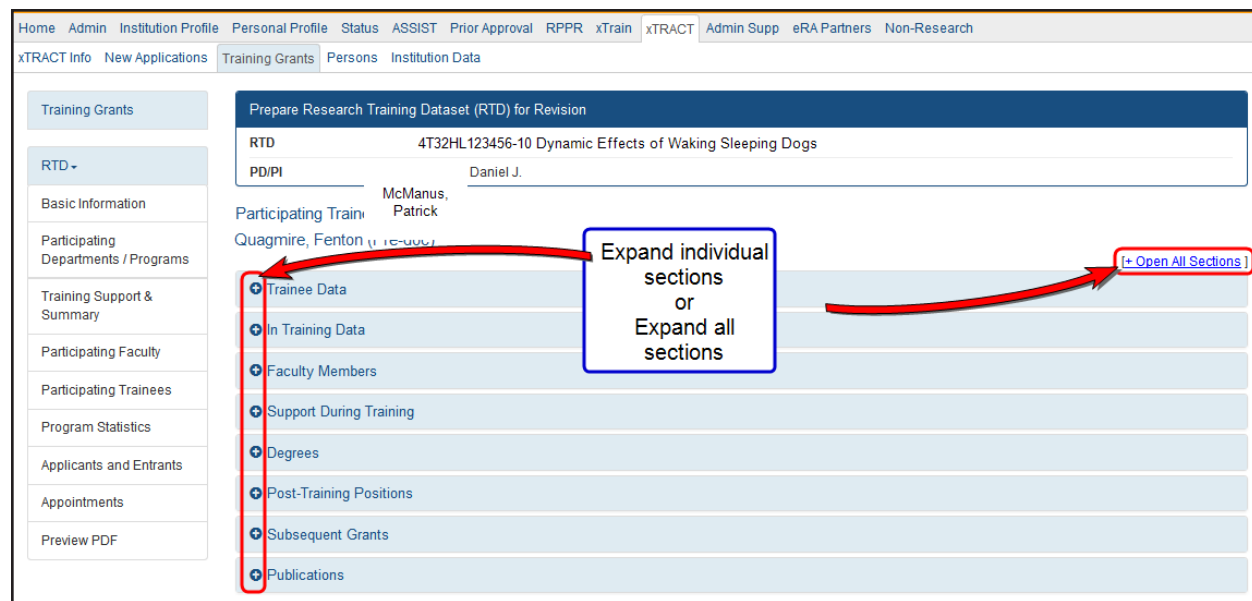
Refer to the topic titled *Student Detail (New Application)* on Page 38.

### 5.5.3 Remove

Select the **Remove** link in the **Actions** column to remove the student from the RTD. At the confirmation, select **Yes**.

### 5.5.4 Student Detail (New Application)

Use the + plus icons to display individual sections of the *Student Detail*. The **Open All Sections** link reveals all collapsed sections at once.



Each section provides a means for viewing or editing the information. Refer to the steps below.

#### 5.5.4.1 Student Data

Use the + plus sign icon in the **Student Data** panel of the *Student Detail* to display the following read-only information:

- Commons User ID or Person ID
- Email

#### 5.5.4.2 In Training Data

Use the + plus sign icon in the **In Training Data** panel of the *Student Detail* to display in training data as described below. Use the **Edit** button to open the fields in a pop-up for editing.

- In Training
- Type



- Research Topic
- Start Date
  - Into Current Degree-Granting Program, for a Predoctoral trainee
  - Into Postdoctoral Research, for Postdoctoral trainee
- End Date (when Trainee Left Program)

### 5.5.4.3 Faculty Members

Displays the faculty members for the student on the RTD.

To add faculty, select the **Add Faculty Member** button.

---

**NOTE:** Up to two faculty members may be associated with a student. If there already two faculty members already listed, then the **Add Faculty Member** button does not display. To change a faculty member, delete the appropriate one first and then add the new one.

---

1. Use the parameters on the *Search for Person(s)* window to find the faculty member. To look outside your institution, uncheck the box titled **Search for persons who have a Commons affiliation with my institution**.

---

**NOTE:** You must enter a Commons ID, Person ID, or Last Name to perform a search.

---

2. Select the **Search Persons** button.

3. All matching records display in the **Person(s)** table. Select the **Add Faculty** button to add the person to the list of faculty for this student.

When the **Add Faculty** button is clicked, the **Action** column will display the word *Added*.

The screenshot shows a window titled "Search for Faculty" with a close button (X) in the top right corner. Below the title bar are two tabs: "Search Criteria" and "Search Results". The "Search Results" tab is active, displaying a section titled "Persons".

Below the "Persons" title, there is a "Filter:" input field and a "Showing 1 - 2 of total 2" indicator. To the right, there is a "Show" dropdown set to "10" and "per page", with a pagination control showing "1" and arrows.

Person Name	Commons User ID	Person ID	Commons Institution	Email	Action
Shorts, Bill	SHORTSB	1234567	UNIVERSITY OF ROCHESTER	eRATest@mail.nih.gov	✓Added
Shorts, Jim	SHORTSJ	7654321	UNIVERSITY OF ROCHESTER	eRATest@mail.nih.gov	<b>Add Faculty</b>

Below the table, there is a blue informational box with a question mark icon and the text: "Looking for a Person but don't see that person listed? You can [create a new xTRACT person record here](#)."

At the bottom right of the window is a "Close" button.

4. Search for and add other faculty as necessary, repeating the steps above.
  - a. Once two faculty members are added, the ability to add more is disabled.
5. Use the **Close** button to close the search screen when finished.

To remove a faculty member from the Student, select the **Delete** link from the **Action** column.

#### 5.5.4.4 Degrees

xTRACT displays a list of completed degrees and associated data.

The **Source** of degrees is displayed as read-only as *xTRACT* (meaning that the degree was added or edited to the person in xTRACT) or as *Commons Profile* (meaning that the degree is from the Commons Personal Profile of the person).

#### To add a degree:

1. Select the **Add Degree** button.
2. Update the fields in the *Create a New Degree* pop-up:

- **Degree:** Select from the list
  - **Other Degree Text:** Enter if Degree selected is *OTH (other type of degree)* or an other category like BOTH, DDOT, DOTH, MDOT, MOTD, and VDOT.
  - **Degree Date:** Enter in MM/YYYY format
  - **Terminal Degree:** Select the **Yes** or **No** . When **Yes** is selected, the terminal degree indicator (*This is the terminal degree of this person.*) displays next to the degree details in the view. Only one degree per person can be set as the Terminal Degree.
  - **Degree Status:** Select Completed or In Progress, as appropriate
  - **Received in Training:** Select Yes or No. Up to three degrees can be selected as Received in Training.
  - **Degree Institution:** Enter the institution name, one institution per degree. Start typing in part of the institution's name and a drop-down menu displays with related institution names. Select the institution name from that menu. If the desired institution name does not appear, a link is provided at the bottom of the drop-down menu that will accept the name of the institution as typed in.
3. Select the **Save** button to save the new degree.
  4. Repeat for any additional degrees.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the degrees as necessary. Degrees with *Commons Profile* as a **Source** cannot be deleted.

#### 5.5.4.5 Post-Training Positions

Displays post-training position information. The **Source** of positions is displayed read-only as *xTRACT* (meaning the position was added or updated for the person in xTRACT) or as *Commons Profile* (meaning the position is from the Commons Personal Profile of the person).

##### To add employment:

1. Select the **Add Employment** button.
2. Provide the following information:
  - **Faculty Teaching Position:** Select from the list
    - Professor; Associate Professor; Assistant Professor; Instructor; Other
  - **Academic Administrative Position:** Select from the list
    - President; Vice President; Dean; Assistant or Associate Dean; Chairperson of Department (or Director); Other
  - **Primary Employment Indicator:** Select the **Yes**, **No**, as appropriate.
  - **Full Time Employment Indicator:** Select **Full-Time** or **Part Time**

- **Current/Initial Employment Indicator:** Select **Primary Current** or **Primary Initial** or both, as appropriate
  - **Primary Activity:** Select from list
    - Research-intensive; Research-related; Further training; Other
  - **Employment Position:** Enter the position title for the employment. This is required.
  - **Institution:** Use the type ahead feature to find the appropriate institution. Start typing in part of the institution's name and a drop-down menu displays with related institution names. Select the institution name from that menu. If the desired institution name does not appear, a link is provided at the bottom of the drop-down menu that will accept the name of the institution as typed in.
  - **Primary Department of Position:** Use the type ahead feature to find the appropriate department. Start typing in part of the department's name and a drop-down menu displays with related department names. Select the department name from that menu. If the desired department name does not appear, a link is provided at the bottom of the drop-down menu that will accept the name of the department as typed in.
  - **Start Date:** Select a date in MM/YYYY format. This is required.
  - **End Date:** Select a date MM/YYYY format.
3. Select the **Save** button to save the changes.
  4. Repeat to add another.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the positions as necessary. Positions with a **Source** of *Commons Profile* cannot be deleted.

#### **5.5.4.6 Subsequent Grants**

##### **NIH and Other Agency Sources of Support on Record**

Displays post-training grant support. This is separated into (1) grant support received from NIH and other Agency Sources that are on record, and (2) other sources of grant funding support received.

Includes the NIH Grant number, Project Title, Award Start Date, Period of Support.

##### **To add additional NIH or Other Agency support:**

1. Select the **Add NIH Source of Support** button to open the *Add NIH Source of Support* pop-up.

**Add Source of Support**

Progress: 0%

**Step 1: Search for and select a Funding Source**

**Search Criteria**

Activity Code

\* IC Code

Serial Number

Suffix Code

Start Date (mm/dd/yyyy)

End Date (mm/dd/yyyy)

\* PD/PI Last Name

**Institution**

To search an institution, start typing the name here

**Search Funding Sources** **Clear**

**Search Results**

**Cancel**

2. Use the available fields to search for funding. Either the IC Code or the PD/PI Last Name fields are required.

**NOTE:** When searching for an institution, start typing the name or part of the name of the institution until it is visible in the list that populates and then select the institution.

**Institution**

pittsburgh res

PITTSBURGH RESEARCH INSTITUTE

PITTSBURGH RESEARCH INSTITUTE 5TH AVE

**Begin typing name and then select from list**

**Institution**

You cannot choose more than 1 item

PITTSBURGH RESEARCH INSTITUTE

**Search Funding Sources** **Clear**

- From the resulting search results click the **Select** button to select the desired funding source.

**Add Source of Support**

Progress: 0%

**Step 1: Search for and select a Funding Source**

Search Criteria

Search Results

Show 10 entries

Search:

Grant Number	PD/PI	Project Title	Institution	Project Start Date	Project End Date	Action
R01NR123456	Sullivan, James P	Epigenomics of Patient Outcomes after Aneurysmal SAH	MONSTERS UNIVERSITY AT MONSTROPOLIS	2012-09-24	2017-06-30	Select
R03HD012345	Wazowski Mike	New Paradigms of P450-mediated Steroid Metabolism	MONSTERS UNIVERSITY AT MONSTROPOLIS	2004-12-01	2007-11-30	Select
R21AG001234	McCoy, Leonard	The Genetic Basis of a Disease Free Model of Aging	STARFLEET MEDICAL ACADEMY	2005-07-15	2009-06-30	Select
R21NR000123	Wazowski Mike	Epigenomics of Patient Outcomes after Traumatic Brain Injury	MONSTERS UNIVERSITY AT MONSTROPOLIS	2014-08-15	2017-07-31	Select

Showing 11 to 20 of 31 entries

Previous 1 2 3 4 Next

- After **Select** is clicked, the window for **Step 2: Enter Source of Support Details** will open. In this window, choose the role and enter **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of this person's involvement.

**Add Source of Support**

Progress: 50%

**Step 2: Enter Source of Support Details**

**Funding Source:**  
Epigenomics of Patient Outcomes after Aneurysmal SAH

**Role during funding:**  
Trainee

**Other role description:**

**Start of Funding (mm/yyyy):**  
10/2016

**End of Funding (mm/yyyy):**  
09/2017

Save Cancel

5. Select **Save**.

Use the **Edit** and **Delete** links to update or remove the funding source as necessary.

### **Other Sources of Support**

Includes Funding Source, Support Type, Project Number, Project Role, and Award Start Date.

#### **To add additional support:**

1. Select the **Add Other Source of Support** button to open the *Add Other Source of Support* pop-up.

Search for support or create new funding source:

- a. Search for support by entering parameters and then selecting the **Search Funding Sources** button.
- b. If the funding source you are looking for is shown in the result list, click the **Select** link from **Action** column for that item.
- c. If the funding source you are looking for does not appear in the result list, look for the link to **create a new funding source here**. You may click that link to manually enter the funding source that you would like to cite as a subsequent grant for this student.

You will then be asked to provide information about the funding source you are creating. Upon providing the necessary information, click the Create Funding Source and Continue button.

2. Select an option from the **Role during funding** drop-down.
3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
4. Select **Save**.

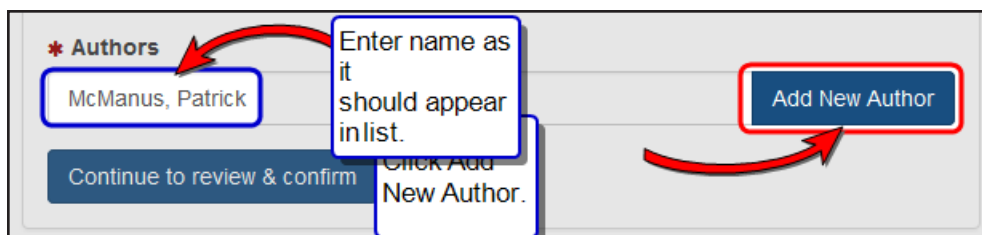
Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary.

#### **5.5.4.7 Publications**

##### **To add a publication:**

1. Select the **Add Publication** button.
2. The *Add Publication* pop-up will appear. You will first be prompted to perform step 1 in that process which is the identification of the faculty member associated with the student's publication. To search for the faculty member, enter search criteria, including one or more of the **\*required** information: **Commons User ID**, **Person ID**, or **Last Name**

- a. Once you have entered your desired search parameters, select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled **Search for persons who have a Commons affiliation with my institution**.
  - b. All matching records display in the **Person(s)** table. Click the **Add Faculty** button to add the person. You will then advance to the second step, to search for the publication you wish to cite. Please note that the faculty member you selected in step 1 is also displayed during step 2, near the bottom of the pop-up.
3. You may now search for a PubMed publication by one of the following: **PMID/PMCID**, **First Name**, **Last Name**, or **Title**
  - a. Upon entering the desired search criteria, click the corresponding **Search** button.
  - b. A set of publications will be returned that satisfy the search criteria you have entered. Click the **Add** button next to the publication you wish to cite.
  - c. You will then advance to the final step of Reviewing and Confirming the publications. Examine the list of authors and check the box where the student's name appears in this list.
4. In lieu of searching/citing an existing PubMed publication, you may enter the necessary citation manually, by clicking the **Manual Edit Publication** button.
  - a. The information needed to define a citation are then shown on the screen -- Title, Journal, Volume, Inclusive Pages, Year, Authors, and a checkbox that may be used to indicate whether the publication is abstract-only. Enter information for all fields that apply, being sure to enter information for the required fields: **Title**, **Journal**, and **Authors**.
  - b. When entering Authors, be aware that this is a list – a list that is empty at first but grows as successive author names are provided. In order to enter an author to the list, enter the author's name as you wish it to appear, in the text box shown and click the button labeled Add New Author:





As authors are entered, the list of authors is displayed and extends to show each new author as illustrated below. Use the on-screen controls as noted, to re-order the list. Use the waste-can icon to delete an author from the list, and use the checkbox next to the author's name to indicate which author is the student for whom this publication is cited:

**\* Authors**

Use the ≡ icon to drag, or the ↑ ↓ buttons to move an author to another location in the list. Check the box to the left of the author's name if he or she is the trainee.

≡	<input type="checkbox"/>	McManus, Patrick	↑	↓	🗑️
≡	<input checked="" type="checkbox"/>	Muldoon, Eddie	↑	↓	🗑️
≡	<input type="checkbox"/>	Crabtree, Rancid	↑	↓	🗑️
≡	<input type="checkbox"/>	Bonemarrow, Olga	↑	↓	🗑️
≡	<input type="checkbox"/>	Quagmire, Fenton	↑	↓	🗑️

Enter an author's name Add New Author

Continue to review & confirm Back

- c. When finished entering the citation information, click the **Continue to Review & Confirm** button. You will then advance to the final step of Reviewing and Confirming the citation information. Review the information shown on this screen, this is what will be saved for this publication.

5. Finally click the **Save** button to save the information. You will see a confirmation at the top of the pop-up.

Use the **Edit** and **Delete** buttons next to a specific publication to update or remove that record.

To indicate no publications, mark the check box titled **Check this box if there are no publications for this trainee.**

After checking the no publications check box, you will be guided through the following steps:

1. Select a reason for **No Publications** from the drop-down list.
2. Search for and select a faculty member.
3. Select the **Save** button to save the information.

## 5.6 Applicants and Entrants (New Application)

To enter Pre-doc and Post-doc applicants and entrants, first enter the start year of the most recently

completed academic year and click the **Submit** button.

Select the **Pre-Doc Applicants and Entrants** and **Post-Doc Applicants and Entrants** links to display and enter data for the specific academic year(s).

Prepare Research Training Dataset (RTD) for New Application

New RTD	419 The Effects of Romulan Ale on Senior Staff
PD/PI	Rhoades, Dusty

**Applicants and Entrants** ⓘ

Start year of the most recently completed academic year:

**Submit**

*The Pre-doc and Post-doc data may be edited via the links below, once the Start of the most recently completed academic year has been provided.*

[Pre-Doc Applicants and Entrants](#)

[Post-Doc Applicants and Entrants](#)

To change the most recently-completed academic year, change the year entered and select **Submit**. When changing **Academic** years, any data entered for **Applicant and Entrant Counts and Characteristics** are retained and associated with the shifted year based on order of years (rather than previously specified year).

For example, let's say the first academic year is 2000-2001 and there are applicant/entrant data entered for that year. If the first academic year is changed to 2001-2002 by changing the most recently-completed academic year from 2001 to 2002, the same applicant/entrant data display for that first year.

## 5.6.1 Predoctoral Applicant and Entrant Counts and Characteristics (New Application)

### 5.6.1.1 Edit the Counts and Characteristics

For each Academic Year, update the *Applicant and Entrant Counts and Characteristics* appropriately. Use the **Edit** buttons provided at the bottom of each table to enter your data. These buttons open up the fields on each table. Enter the data and select the **Save** buttons to save it. Or select **Cancel** to exit editing without saving the changes.

Within this section, you will find a separate tab for each of the 5 most recent academic years. You may change the academic year that you are entering at any time, by simply selecting the appropriate tab. By default you will be positioned at the most recent academic year when this screen is first displayed.

Prepare Research Training Dataset (RTD) for New Application

New RTD

419 The Effects of Romulan Ale on Senior Staff

PD/PI

Beach, Sandy

2016 - 2017

2015 - 2016

2014 - 2015

2013 - 2014

2012 - 2013

Summary

Predoctoral Applicant and Entrant Counts and Characteristics

+ Open All Sections

Counts: Department or Program

Department or Program	Total Applicant Pool	Applicants Eligible for Support	New Entrants to the Program	New Entrants Eligible for Support
CENTER FOR VACCINE BIOLOGY AND IMMUNOLOGY/SCHOOL OF MEDICINE AND DENTISTRY				
Total	0	0	0	0

Edit Counts

+ Characteristics: GPA

+ Characteristics: Research Experience

+ Characteristics: Prior Institutions

+ Characteristics: Diversity

### 5.6.1.2 Counts table

For Predoctoral Applicants and Entrants, Counts are entered by Participating Departments or Programs. If a Department or Program is missing, refer to the topic titled *Participating Departments and Programs (New Application)* on Page 17. The following fields are provided for data entry on each department or program:

- Department or Program (read only)
- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support

### 5.6.1.3 Characteristics

The following tables exist for Characteristics:

## GPA

Enter the Mean GPA, Lowest GPA, and Highest GPA for the following:

- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support

## Research Experience

Enter the mean, lowest, and highest number of months of prior, full-time research experience for the following:

- New Entrants to the Program
- New Entrants Eligible for Support

## Prior Institutions

In the *Prior Institutions* section, you may add an institution to the list by typing the first few characters of an institution name into the blank line shown.

---

**Tip:** As you start to type, a list of known institutions that match your text are shown in a drop-down menu. When you see the desired institution in the menu, click on that name to select it. If the name you wish to enter is not presented in the menu, a link is provided in the drop-down menu which will allow you to simply accept the name that you have entered instead.

---

Select the appropriate institution from the drop-down list. Once the institution is selected and displayed on the table, enter a numeric value in the **New Entrants to the Program** and/or **New Entrants Eligible for Support** fields.

Finally, to complete and save the information you've just entered for this institution, click the **Add Prior Institution** button in the Action column.

For any institutions that were previously added to the list, you may use the **Remove** button to remove the institution from the list entirely, or you may use the **Edit** button to change either of the following values for that institution:

- New Entrants to the Program
- New Entrants Eligible for Support

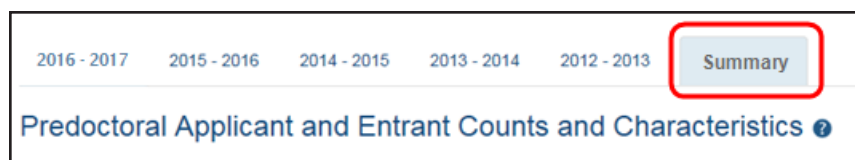
## Diversity

Enter the percent of entrants with a disability and the percent from under-represented racial and ethnic groups for the following:

- New Entrants to the Program
- New Entrants Eligible for Support

#### 5.6.1.4 Summary of Counts and Characteristics

Select the **Summary** tab to display a summary for predoctoral applicants and entrants. The summary displays the means across all years for the counts and characteristics.



This section is read only and is computed based on the information that has been entered across academic years.

#### 5.6.2 Postdoctoral Applicant and Entrant Counts and Characteristics (New Application)

For each Academic Year, update the *Applicant and Entrant Counts and Characteristics* appropriately. Use the **Edit** buttons provided at the bottom of each table to enter your data. These buttons open up the fields on each table. Enter the data and select the **Save** buttons to save it. Or select **Cancel** to exit editing without saving the changes.

Prepare Research Training Dataset (RTD) for New Application

New RTD

419 The Effects of Romulan Ale on Senior Staff

PD/PI

Beach, Sandy

2016 - 2017
2015 - 2016
2014 - 2015
2013 - 2014
2012 - 2013
Summary

Postdoctoral Applicant and Entrant Counts and Characteristics

+ Open All Sections

Counts: Degree Types

	Total Applicant Pool	Applicants Eligible for Support	New Entrants to the Program	New Entrants Eligible for Support
PhDs				
MDs				
Dual-Degree Holders				
Other Degree Holders				
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

Edit Counts

+ Characteristics: Publications

+ Characteristics: Prior Institutions

+ Characteristics: Diversity

### 5.6.2.1 Counts table

For PhDs, MDs, dual-degree holders, and other degree holders, update the following information:

- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support

### 5.6.2.2 Characteristics

The following tables exist for Characteristics:

### **Publications**

Enter the mean, lowest, and highest number of publications as well as the mean, lowest, and highest number of first author publications for the following:

- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support

### **Prior Institutions**

Use the **Characteristics: Research Experience** section to search and select an institution. Start typing in the Institution field. Select the appropriate institution from the drop-down list. Once the institution is selected and displayed on the table, enter a numeric value in the **New Entrants to the Program** and/or **New Entrants Eligible for Support** fields. Select the **Add Prior Institution** link in the **Action** column.

Use the **Edit** and **Remove** links to modify or remove this data.

- New Entrants to the Program
- New Entrants Eligible for Support

### **Diversity**

Enter the percent of entrants with a disability and the percent from under-represented racial and ethnic groups for the following:

- New Entrants to the Program
- New Entrants Eligible for Support

#### **5.6.2.3 Summary of Counts and Characteristics**

Select the **Summary** tab to display a summary for postdoctoral applicants and entrants. The summary displays the means across all years for the counts and characteristics.

This section is read only and computed based on the information that has been entered across academic years.

### **5.7 Preview PDF (New Application)**

Select the **Preview PDF** link to open save, and/or print the training tables. An *In Progress* watermark will be printed on the *Training Table* PDF until the RTD is finalized.

## 5.8 Finalize RTD (New Application)

Certain users have the ability to finalize the RTD for a training grant. Finalized RTDs are marked as *Final* and cannot be edited.

To finalize an RTD

1. Select the **Finalize RTD** link from the **RTD** links on the left side of the screen.

A confirmation message warns: *Are you sure you want to finalized this RTD? Once finalized, the RTD cannot be edited?*

**IMPORTANT:** Once you finalize, the RTD cannot be edited. Select the **No** button if you do not wish to finalize.

2. Select the **Yes** button to finalize the RTD.

xTRACT generates a PDF version of the training tables without the *In Progress* watermark, updates the status of the RTD to *Final*, and locks the RTD for editing.

You will have the option to view the finalized PDF at any time on the *Search New RTDs* screen and unfinalize the RTD if needed.



## 6 Prepare RTD for Research Performance Progress Report (RPPR)

---

To access the screen:

1. Search for the training grant on the *Search for Training Grants* screen. Refer to the topic titled *Search for Training Grants on Page 7* for steps.
2. From the **Action** column of the search results, select the appropriate link to access the *Prepare Research Training Dataset (RTD) for Research Performance Progress Report (RPPR)* screen:
  - To initiate the RTD for the progress report: Select the **Prepare for RPPR** link.
  - To continue working on an initiated RTD: Select the **Continue for RPPR** link.

---

**NOTE:** A pop-up message may appear if RPPR RTD information exists for current or prior years. The copy options provided are conditional on the year and type of grant for which the RPPR RTD is being prepared. This feature allows the user to import and populate current or prior year RTDs or to continue one that has been started.

---

**IMPORTANT:** If the user selects the option to continue without copying data over, that copy option will no longer be available for the RTD being prepared.

The *Prepare Research Training Dataset (RTD) for Research Performance Progress Report (RPPR)* screen opens for the selected training grant. Use the links listed under **RTD** on the left side of the screen to maintain the specific sections of the RTD:

- Maintain participating trainees
- Maintain program statistics (if applicable to the training grant)
- Preview PDF
- Finalize the RTD

Selecting the links above opens the specific section of the RTD. From within, you can add, edit, and/or remove data.

### 6.1 Participating Trainees (RPPR)

Displays the participating trainees added to the RTD - or a message indicating that none has been added, when appropriate. From this screen, you can add, edit, and remove participating trainees.

Training Grants

RTD ▾

Basic Information

Participating Trainees

Program Statistics

Preview PDF

Prepare Research Training Dataset (RTD) for Research Performance Progress Report (RPPR)

RTD 5T32CA999999-40 Tumor Cell Biology Training Program

PD/PI Lemar, Hedy

RTD Reporting Period 04/01/2000 - 06/30/2016

Participating Trainees ⓘ

Add Trainee

Filter:

Show 10 per page

Showing 1 - 10 of total 79

Person Name	Commons User ID	Person ID	Trainee Type	Start Date	End Date	Action
Swanson, Gloria	SWANSONG		Pre-doc			<a href="#">Edit</a> <a href="#">Remove</a>
Grable, Betty	GRABLEB		Pre-doc			<a href="#">Edit</a> <a href="#">Remove</a>

Participating trainee(s) are listed in a table at the bottom of the screen along with the following information:

- **Person Name**
- **Commons User ID** (if available)
- **Person ID**
- **Trainee Type:** Pre-doc; Post-doc; Short Term
- **Start Date**
- **End Date**
- **Actions**
  - The **Edit** link opens the *Participating Trainee Detail* for the selected trainee. Refer to the topic titled *Participating Trainee Detail (RPPR)* on Page 61.
  - The **Remove** link removes the person from the RTD.

The **Add Trainee** feature allows you to search for and add existing trainees or create new trainees to add to the progress report. Refer to the topic titled *Add Trainee (RPPR)* on Page 56 for more information.

### 6.1.1 Add Trainee (RPPR)

You can add a trainee to a progress report from the RTD screen. To access this screen, you must first perform a search for the grant.

Select the **Prepare for RPPR** or **Continue for RPPR** link from the **RTD Action** column for the grant as appropriate to open the *Prepare Research Training Dataset (RTD) for Research Performance Progress Report (RPPR)* screen.

To add a trainee from a search:

1. Select the **Add Trainee** button.
2. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled **Search for persons who have a Commons affiliation with my institution**.

---

**NOTE:** You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

---

3. All matching records display in the **Person(s)** table. Select the **Add Trainee** link in the **Action** to add the person.
4. Select the **Trainee Type** from the pop-up box: Pre Doctoral, Post Doctoral or Short Team and click **OK**.
5. Repeat for any to add other trainees. Added trainees appear in the Person(s) list with the word *Added* shown in the **Action** column.
6. Use the **Close** button to close the search screen.

**Search for Trainees**

**Search Criteria**

\* Either Commons User ID or Person ID or Last Name is required to perform person search.

\* Commons User ID

\* Person ID

First Name

Middle Name

\* Last Name

Rhodes

☒ Search for persons who have a Commons affiliation with my institution

You can perform a wildcard search on Commons ID or Last Name, by using the "%" character.  
For example: abcd% or %abcd% or ab%cd%.

Search Persons Clear

Close

Search for Trainees

Search Criteria

Search Results

Persons

Showing 1 - 2 of total 2

Filter:

Show 10 per page 1

Person Name	Commons User ID	Person ID	Commons Institution	Email	Action
Rhoades, Bumpy	RHOADESB	1234567	UNIVERSITY OF CALIFORNIA LOS ANGELES	eRATest@mail.nih.gov	Add Trainee as
Rhoades, Dusty	RHOADESD	7654321	UNIVERSITY OF CALIFORNIA LOS ANGELES	eRATest@mail.nih.gov	Added

Looking for a Person but don't see that person listed? You can [create a new xTRACT person record here](#).

Close

To add a trainee you are creating:

1. Perform a search as described above. You cannot create a new person record unless you first perform a search.
2. Select the **Create a new xTRACT person record here** button located under the Person(s) table. This button is only available after you have performed a search.

Search for Trainees

Search Criteria

No person information could be found matching the search criteria you have entered. Please consider refining or adjusting your search criteria and try again. If you have already tried this and the desired person still cannot be found, you may [create a new xTRACT person record here](#)

Either Commons User ID or Person ID or Last Name is required to perform person search.

Commons User ID

Person ID

First Name

Middle Name

Last Name

shorts

☒

Search for persons who have a Commons affiliation with my institution

You can perform a wildcard search on Commons ID or Last Name, by using the "%" character.  
For example: abcd% or %abcd% or ab%cd%.

Search Persons

Clear

Close

The *Create xTRACT Person* screen displays.

**Create xTRACT Person, to be added as a Participating Trainee** ✕

**\* Required Fields**

**\* Add Trainee as**

-- Select -- ▼

**Prefix**

-- Select -- ▼

**\* First Name**

**Middle Name**

**\* Last Name**

**Suffix**

-- Select -- ▼

**Email Address**

**Save** **Cancel**

3. Enter the person data in the designated fields.
  - **Add Trainee as** - Select an option from the list.
  - **Prefix**: Select an option from the list.
  - **First Name** (required)
  - **Middle Name**
  - **Last Name** (required)
  - **Suffix**: Select an option from the list.
  - **Email Address**
4. Click the **Save** button to save the changes.

Use the displayed xTRACT Person Profile to provide details about the added person. For additional information, refer to the topic titled *xTRACT Person Profile on Page 179*.

## 6.1.2 Participating Trainee Detail (RPPR)

While preparing an RTD for a progress report, you can open the *Participating Trainee Detail* for a trainee by selecting that trainee's **Edit** link. The *Participating Trainee Detail* for the selected person is grouped into panels. Use the + plus sign icon and **Edit** buttons and links to display and edit the information as detailed below.

Prepare Research Training Dataset (RTD) for Research Performance Progress Report (RPPR)

RTD

5T32CA999999-40 Tumor Cell Biology Training Program

PD/PI

DORIGHT, DUDLEY

RTD Reporting Period

04/01/2000 - 06/30/2016

Participating Trainee Detail ?

Doright, Dudley (Pre-doc)

+ Open All Sections

+ Trainee Data

- In Training Data

! Because Start Date is needed to set the trainee's Training Years, it is required to finalize the RTD. If the Trainee is not still in training, then End Date is also needed to set to Training Years and is required to finalize the RTD.

In Training:

No

Type:

Pre-doc

Research Topic:

Start Date into Current Degree-Granting Program:

End Date (when Trainee Left Program):

Edit

+ Faculty Members

+ Support During Training

+ Degrees

+ Post-Training Positions

+ Subsequent Grants

**IMPORTANT:** The information displayed in the trainee detail is comprised of information pulled from the trainee's eRA Commons Personal Profile, where available. However, updates made to the xTRACT trainee detail will not update that trainee's Personal Profile in Commons.

### 6.1.2.1 Trainee Data

Use the **View** link in the **Trainee Data** panel of the *Participating Trainee Detail* to display the following read-only information, as applicable:

- Commons User ID
- Email

### 6.1.2.2 In Training Data

Use the **View** link in the **In Training Data** panel of the *Participating Trainee Detail* to display in training data as described below. Use the **Edit** button to open the fields in a pop-up for editing.

- In Training
- Type
- Research Topic
- Start Date
  - Current Degree-Granting Program for a Predoctoral trainee
  - Postdoctoral Research for Postdoctoral trainee
- End Date (when Trainee Left Program)

---

**NOTE:** In order to finalize the RTD for an RPPR, all trainees must have a start date in the **In Training Data** section. Additionally, trainees with *No* selected for **In Training** status must have an end date.

---

### 6.1.2.3 Faculty Members

Displays the participating faculty added to the RTD.

To add faculty, select the **Add Faculty Member** button.

---

**NOTE:** Up to two faculty members may be associated with a student. If there already two faculty members already listed, then the **Add Faculty Member** button does not display. To change a faculty member, delete the appropriate one first and then add the new one.

---

1. Use the parameters on the *Search for Person(s)* window to find the faculty member. To look outside your institution, uncheck the box titled **Search for persons who have a Commons**



**affiliation with my institution.**

---

**NOTE:** You must enter a Commons ID, Person ID, or Last Name to perform a search.

---

2. Select the **Search Persons** button.

**Search for Faculty**

**Search Criteria**

\* Either Commons User ID or Person ID or Last Name is required to perform person search.

\* Commons User ID

\* Person ID

First Name

Middle Name

\* Last Name

Shorts%

☒ Search for persons who have a Commons affiliation with my institution

You can perform a wildcard search on Commons ID or Last Name, by using the "%" character.  
For example: abcd% or %abcd% or ab%cd%.

**Search Persons** **Clear**

**Close**

3. All matching records display in the **Person(s)** table. Select the **Add Faculty** button to add the person to the RTD.

When the **Add Faculty** button is clicked, the **Action** column will display the word *Added*.

**Search for Faculty**

Search Criteria

Search Results

**Persons**

Filter:

Showing 1 - 2 of total 2

Show 10 per page < 1 >

Person Name	Commons User ID	Person ID	Commons Institution	Email	Action
Shorts, Bill	SHORTSB	1234567	UNIVERSITY OF ROCHESTER	eRATest@mail.nih.gov	✓ Added
Shorts, Jim	SHORTSJ	7654321	UNIVERSITY OF ROCHESTER	eRATest@mail.nih.gov	Add Faculty

Looking for a Person but don't see that person listed? You can create a new xTRACT person record here.

Close

4. Search for and add other faculty as necessary, repeating the steps above.
  - a. Once two faculty members are added, the ability to add more is disabled.
5. Use the **Close** button to close the search screen when finished.

To remove a faculty member from the RTD, select the **Delete** link in the **Action** column.

#### 6.1.2.4 Support During Training

**NOTE:** This section applies to pre-doc and and post-doc trainees only.

Sources of support, both within and outside of NIH, can be maintained in this section. Click on the collapsed panel to display the information.

After a start date has been added for the trainee in *In Training Data*, the **Training Years (TYs)** will be displayed as read-only with corresponding abbreviations for funding sources in **Support During Training**.

#### This NIH Training Grant

Includes the NIH Grant number , Project Title, Period of Support.

Click the **Add This NIH Source of Support** to add support from **This NIH Training Grant**. Enter the **Start of Funding** and **End of Funding**. To remove support from **This NIH Training Grant**, select **Delete All from This NIH Funding Source of Support**.

## NIH Sources of Support

Includes the NIH Grant number, Project Title, Period of Support.

To add additional NIH or Other Agency support:

1. Select the **Add NIH Source of Support** button to open the *Edit/Add Sources of Support* pop-up.
2. Select the search icon next to **Funding Source** to open query fields.
  - a. Enter search criteria in the fields.
  - b. Select the **Search Funding Sources** button.
  - c. From the NIH Funding Source(s) list, select the funding source by clicking the appropriate **Select Funding Source** link in the **Action** column.
3. Select an option from the **Role during funding** drop-down.
4. Enter **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of this person's involvement.
5. Enter the **Other role description** if *Other* was selected for **Role during funding**.
6. Select **Save**.
7. Repeat the search to add more.
8. Select **Close** when finished.

Use the **Edit** and **Delete** links in the Action column to update or remove the funding source as necessary.

## Other Sources of Support

Includes Funding Source, Support Type, Project Number, Project Role, and Award Start Date.

To add additional support:

1. Select the **Add Other Source of Support** button to open the *Edit/Add Sources of Support* pop-up.

Search for support or create new funding source:

To search:

- a. Search for support entering the parameters given and selecting **Search Funding Sources** button.
- b. From the result list, click the **Select Funding Source** link from the **Action** column for the correct project.

To create:

- a. Select the **Create Funding Source** button.
  - b. Update the fields. Required fields show a red asterisk (\*).
  - c. Select **Save**.
2. Select an option from the **Role during funding** drop-down.
  3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
  4. Enter the **Other role description** if *Other* was selected for **Role during funding**.
  5. Select **Save**.
  6. Repeat the search to add more.
  7. Select **Close** when finished.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary.

#### 6.1.2.5 Degrees

xTRACT displays a list of completed degrees and associated data in reverse chronological order, with incomplete degrees following.

The **Source** of degrees is displayed as read-only as *xTRACT* (meaning that the degree was added to the person in xTRACT) or as *Commons Profile* (meaning that the degree is from the Commons Personal Profile of the person).

To add a degree:

1. Select the **Add Degree** button.
2. Update the fields in the *Create a New Degree* pop-up:
  - **Degree**: Select from the list
  - **Other Degree Text**: Enter the name of the degree if an *OTH* type of degree was selected.
  - **Degree Date**: Enter in MM/YYYY format
  - **Terminal Degree**: Select the **Yes** or **No** as appropriate. When **Yes** is selected, the terminal degree indicator (*This is your terminal degree.*) displays next to the degree details in the view. A person can only have one terminal degree.
  - **Degree Status**: Select Completed or In Progress, as appropriate
  - **Received in Training**: Select Yes or No. Up to three degrees can be set as Received in Training.
  - **Degree Institution**: Enter the institution name, one institution per degree. You can search for an institution by selecting the magnifying glass search icon.

3. Select the **Save** button to save your changes.
4. Repeat for any additional degrees.
5. Select the **Close** button when finished.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the degree(s) as necessary. Degrees *Commons Profile* as the **Source** cannot be deleted.

#### **6.1.2.6 Post-Training Positions**

Displays post-training positions employment information.

The **Source** of positions is displayed as read-only as *xTRACT* (meaning that the position was added to the person in xTRACT) or as *Commons Profile* (meaning that the position is from the Commons Personal Profile of the person).

To add employment:

1. Select the **Add Employment** button.
2. Provide the following information:
  - **Faculty Teaching Position:** Select from the list:
    - Professor; Associate Professor; Assistant Professor; Instructor; Other
  - **Academic Administrative Position:** Select from the list:
    - President; Vice President; Dean; Assistant or Associate Dean; Chairperson of Department (or Director); Other
  - **Primary Employment Indicator:** Select the **Yes** or **No**.
  - **Full Time Employment Indicator:** Select **Full-Time** or **Part-Time**
  - **Current/Initial Employment Indicator:** Select **Primary Current** or **Primary Initial**
  - **Primary Activity:** Select from list
    - Research-intensive; Research-related; Further training; Other
  - **Employment Position:** This is required.
  - **Institution:** Enter the institution or select the icon to open a search box
  - **Primary Department of Position:** Enter the department or select the icon to open a search box
  - **Start Date:** Select a date in MM/YYYY format. This is required.
  - **End Date:** Select a date MM/YYYY format.
3. Select the **Save** button to save your changes.
4. Repeat to add another.
5. Select **Close** to close the window.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the position(s) as necessary. Positions with *Commons Profile* as the **Source** cannot be deleted.

### 6.1.2.7 Subsequent Grants

#### NIH and Other Agency Sources of Support

Includes the NIH or Other Agency Grant number, Project Title, Period of Support.

To add additional NIH or Other Agency support:

1. Select the **Add Source of Support** button to open the *Edit/Add Sources of Support* pop-up.
2. Select the search icon next to **Funding Source** to open query fields.
  - a. Enter search criteria in the fields.

The screenshot shows a search interface for institutions. At the top, the label "Institution" is above a text input field containing "pittsburgh res". Below the input field is a dropdown menu with two suggestions: "PITTSBURGH RESEARCH INSTITUTE" and "PITTSBURGH RESEARCH INSTITUTE 5TH AVE". To the right of the input field is a search icon. A blue box with the text "Begin typing name and then select from list" and a red arrow points to the search icon. Another red arrow points from the search icon to the input field.

- b. Select the **Search Funding Sources** button.

The screenshot shows a dialog box titled "Add Source of Support" with a close button (X) in the top right corner. Below the title bar is a progress indicator showing "Progress: 0%". The main content area is titled "Step 1: Search for and select a Funding Source". It contains a "Search Criteria" section with the following fields: "Activity Code", "IC Code" (marked with a red asterisk), "Serial Number", "Suffix Code", "Start Date (mm/dd/yyyy)", "End Date (mm/dd/yyyy)", "PD/PI Last Name" (marked with a red asterisk), and "Institution". The "Institution" field has a placeholder text: "To search an institution, start typing the name here". Below these fields are two buttons: "Search Funding Sources" and "Clear". At the bottom of the dialog box is a "Search Results" section, which is currently empty. A "Cancel" button is located in the bottom right corner of the dialog box.

- c. From the NIH Funding Source(s) list, select the funding source by clicking the appropriate **Select Funding Source** link in the **Action** column.
3. Select an option from the **Role during funding** drop-down.
  4. Enter **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of this person's involvement.
  5. Select **Save**.
  6. Repeat the search to add more.
  7. Select **Close** when finished.

Use the **Edit** and **Delete** links in the Action column to update or remove the funding source as necessary.

### Other Sources of Support

Includes Funding Source, Support Type, Project Number, Project Role, and Award Start Date.

To add additional support:

1. Select the **Add Other Source of Support** button to open the *Edit/Add Sources of Support* pop-up.

Search for support or create new funding source:

To search:

- a. Search for support entering the parameters given and selecting **Search Funding Sources** button.
- b. From the result list, click the **Select Funding Source** link from the **Action** column for the correct project.

To create:

- a. Select the **Create Funding Source** button.
  - b. Update the fields. Required fields show a red asterisk (\*).
  - c. Select **Save**.
2. Select an option from the **Role during funding** drop-down.
  3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
  4. Select **Save**.
  5. Repeat the search to add more.
  6. Select **Close** when finished.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary.



## 6.2 Program Statistics (RPPR)

Prepare Research Training Dataset (RTD) for Research Performance Progress Report (RPPR)	
RTD	5T32CA999999-40 Tumor Cell Biology Training Program
PD/PI	Doright, Dudley
RTD Reporting Period	04/01/2000 - 06/30/2016

### Program Statistics

Are program statistics applicable for this reporting period?

☒ Yes ☐ No

\* Percentage of Trainees Entering Graduate School 10 Years Ago Who Completed the Ph.D.

0.0 %

\* Average Time to Ph.D. for Trainees in the Last 10 Years (not including leaves of absence)

0.0 Year(s)

[Save Program Statistics](#) [Clear](#)

The **Program Statistics** section is only available for training grants that have Predoctorate Trainees.

1. Enter the program statistics as follows:
  - Percentage of Trainees Entering Graduate School 10 Years Ago Who Completed the Ph.D.
  - Average Time to Ph.D. for Trainees in the Last 10 Years (not including leaves of absence)
2. Select the **Save Program Statistics** button.

Use the checkbox to indicate that **Program Statistics are not applicable for this reporting period**.

## 6.3 Preview PDF (RPPR)

Select the **Preview PDF** link to open save, and/or print the training tables. An *In Progress* watermark will be printed on the *Training Table* PDF until the RTD is finalized.

## 6.4 Finalize RTD (RPPR)

Certain users have the ability to finalize the RTD for a training grant. Finalized RTDs are marked

as *Final* and cannot be edited.

To finalize an RTD

1. Select the **Finalize RTD** link from the **RTD** links on the left side of the screen.

A confirmation message warns: *Are you sure you want to finalized this RTD? Once finalized, the RTD cannot be edited?*

**IMPORTANT:** Once you finalize, the RTD cannot be edited. Select the **No** button if you do not wish to finalize.

2. Select the **Yes** button to finalize the RTD.

xTRACT generates a PDF version of the training tables without the *In Progress* watermark, updates the status of the RTD to *Final*, and locks the RTD for editing.

You will have the option to view the finalized PDF at any time on the *Search New RTDs* screen and unfinalize the RTD if needed.

If data are needed to finalize the RPPR RTD, the appropriate error message(s) display as follows:

- *Missing Required Data: Start Date in the In Training Data section is required to finalize the RTD. Please enter the missing data and try again.*
- *Missing Required Data: End Date in the In Training Data section is required to finalize the RTD. Please enter the missing data and try again.*

All trainees must have a start date in the **In Training Data** section. Additionally, trainees with **No** selected for **In Training** status must have an end date.

## 7 Prepare RTD for a Renewal Application

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To access the screen:

1. Search for the training grant on the *Search for Training Grants* screen. Refer to the topic titled [Search for Training Grants on Page 7](#) for steps.
2. From the **Action** column of the search results, select the appropriate link to access the *Prepare for Research Training Data Set (RTD) for Renewal* screen:
  - To initiate the RTD for the renewal application: Select the **Prepare for Renewal** link.
  - To continue working on an initiated RTD: Select the **Continue for Renewal** link.

---

**NOTE:** When the renewal is for the final non-competing year, the user will see a pop-up message providing the option of; continuing an RPPR RTD that has been started for the final year; or copying one from a prior year. If an RTD has been started but not finalized, the user will be instructed to cancel the renewal application and finalize the RTD first.

---

**IMPORTANT:** If the user selects the option to continue without copying data over, that copy option will no longer be available for the RTD being prepared.

The *Prepare Research Training Dataset (RTD) for Renewal* screen opens for the selected training grant.

Use the links listed under **RTD** on the left side of the screen to maintain the specific sections of the RTD:

- **Participating Departments/Programs**
- **Training Support & Summary**
- **Participating Faculty**
- **Participating Trainees**
- **Program Statistics**
- **Applicants and Entrants**
- **Appointments**
- **Preview PDF**
- **Finalize RTD**

Selecting the links above opens the specific section of the RTD. From within, you can add, edit, and/or remove data.

## 7.1 Participating Departments and Programs (Renewal)

Use this section to add/remove departments and programs.

### 7.1.1 Add Departments

1. Select Participating **Departments/Programs** on the left.
2. Select the **Add Participating Departments or Programs** button.

Prepare Research Training Dataset (RTD) for Renewal

RTD	5T32CA009056-40 Tumor Cell Biology Training Program
PD/PI	Whiplash, Snidely

### Participating Departments and Programs ?

**Add Participating Departments or Programs**

Participating Departments and Programs have not been added to the RTD yet. They are needed to prepare Census, Training Support, and Applicant & Entrants data for the Renewal RTD.

Showing 0 to 0 of 0 entries

Department or Program Name	Type	Actions
No data available in table		

3. Start typing in the text box. The system will display a list of departments and programs with that character string in a drop-down menu.
4. Find the appropriate department in the results list drop-down and select the appropriate department. Major Components are also displayed with the Department to differentiate among departments with the same name in different units of the organization.

create one.' At the bottom are 'Save' and 'Cancel' buttons."/>

Add Participating Departments and Programs

Choose your Department or Program

Select...

Looking for a Program but don't see it listed? You can also [create one](#).

Save Cancel

Add Participating Departments and Programs

Choose your Department or Program

acc

CENTER FOR VACCINE BIOLOGY AND IMMUNOLOGY

Save Cancel

5. Select the **Save** button and the department and close the screen.

The *Participating Departments and Programs* screen updates to show the added department(s) in a table. Added programs and departments display in the same table. The **Actions** column includes links for removing and editing the programs and departments.

## 7.1.2 Add Programs

1. Select the **Add Participating Departments or Programs** button.

The screenshot shows the 'Prepare Research Training Dataset (RTD) for Renewal' page. At the top, there is a header bar with the title. Below it, a form displays the RTD ID '5T32CA009056-40 Tumor Cell Biology Training Program' and the PD/PI 'Whiplash, Snidely'. The main section is titled 'Participating Departments and Programs' with a help icon. A blue button labeled 'Add Participating Departments or Programs' is circled in red. Below the button, a message states: 'Participating Departments and Programs have not been added to the RTD yet. They are needed to prepare Census, Training Support, and Applicant & Entrants data for the Renewal RTD.' At the bottom, there is a table with columns 'Department or Program Name', 'Type', and 'Actions'. The table is currently empty, showing 'No data available in table'.

Prepare Research Training Dataset (RTD) for Renewal		
RTD	5T32CA009056-40 Tumor Cell Biology Training Program	
PD/PI	Whiplash, Snidely	
<b>Participating Departments and Programs</b> ?		
<b>Add Participating Departments or Programs</b>		
Participating Departments and Programs have not been added to the RTD yet. They are needed to prepare Census, Training Support, and Applicant & Entrants data for the Renewal RTD.		
Showing 0 to 0 of 0 entries		
Department or Program Name	Type	Actions
No data available in table		

2. Start typing in the text box. The system will display a list of programs with that character string in a drop-down menu.
3. Find the appropriate program in the results list drop-down and select the appropriate program.

The **Action** column updates to show *Added* for the added program. You can repeat the step to **Add Program** for as many programs as necessary.

To add a Program not available in the search results, select **Create One. Add Program Name** (required) and **Program Description** (optional) and select **Create Program and Select as Participating in my RTD**.

**Add Participating Departments and Programs**

Choose your Department or Program

Select...

Looking for a Program but don't see it listed? You can also [create one](#).

**Save** **Cancel**

**Add Participating Departments and Programs**

Choose your Department or Program

Select...

Looking for a Program but don't see it listed? You can also [create one](#).

**Save** **Cancel**

Create Program, to be added to my list of participating programs on this RTD ?

★ Required field(s)  
★ Program Name

Department of Hard Knocks

Program Description

**Create Program and Select as Participating in my RTD** **Cancel**

4. Click the **Save** or the **Create Program and Select as Participating in my RTD** button to add the program and close the screen.
  - a. After clicking the **Create Program and Select as Participating in my RTD** button, click the subsequent **Save** button.

The *Participating Departments and Programs* screen updates to show the added program(s) in a table. Added programs and departments display in the same table. The **Actions** column includes links for removing and editing the programs and departments.

### 7.1.3 Edit Departments & Programs

To edit a program or department, select the **Edit** button from the **Actions** column.

Participating Departments and Programs ⓘ

Add Participating Departments or Programs

Showing 1 - 2 of total 2

Department or Program Name	Type	Actions
CENTER FOR VACCINE BIOLOGY AND IMMUNOLOGY/SCHOOL OF MEDICINE AND DENTISTRY	Department	<a href="#">Edit</a> <a href="#">Remove</a>
NEUROSURGERY/SCHOOL OF MEDICINE AND DENTISTRY	Department	<a href="#">Edit</a> <a href="#">Remove</a>

Update the Census information as necessary.

#### Faculty

- Total
- Participating


#### Predotorates

- Total
- Supported by any HHS Training Award
- Students with Participating Faculty
- Eligible Students with Participating Faculty
- TGE Predocs Supported by this Training Grant
- Predocs Supported by this Training Grant (R90 Only)

#### Postdoctorates

- Total
- Supported by any HHS Training Award
- Postdocs with Participating Faculty
- Eligible Postdocs with Participating Faculty
- TGE Postdocs Supported by this Training Grant
- Postdocs Supported by this Training Grant (R90 Only)



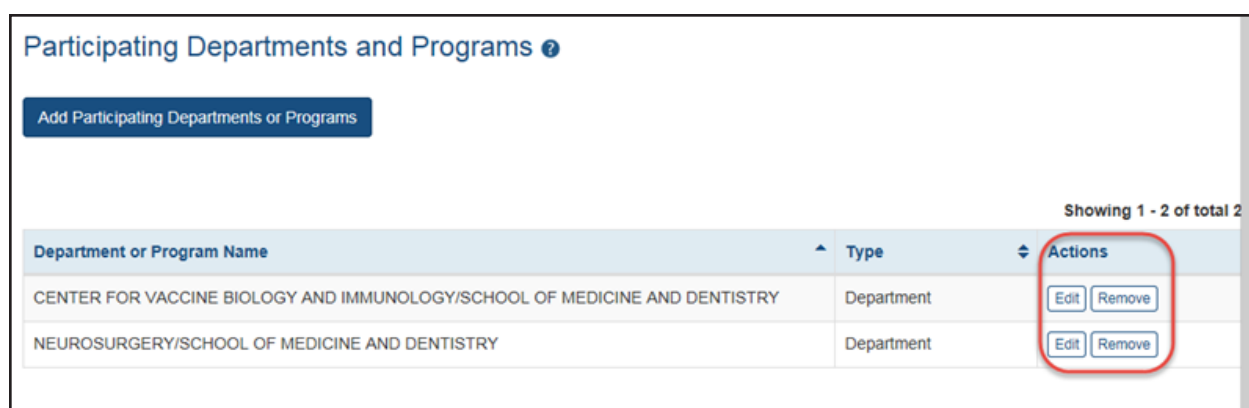
Prepare Research Training Dataset (RTD) for Renewal	
RTD	5T32CA999999-40 Tumor Cell Biology Training Program
PD/PI	Hope, Bob
Participating Department/Program Detail 	
Waldenstrom macroglobulinemia	
Census	
Faculty	
Total	<input type="text" value="0"/>
Participating	<input type="text" value="0"/>
Predoctorates	
Participating	<input type="text" value="0"/>
Supported by any HHS Training Award	<input type="text" value="0"/>
Students with Participating Faculty	<input type="text" value="0"/>
Eligible Students with Participating Faculty	<input type="text" value="0"/>
TGE Predocs Supported by this Training Grant	<input type="text" value="0"/>
Postdoctorates	
Total	<input type="text" value="0"/>
Supported by any HHS Training Award	<input type="text" value="0"/>
Postdocs with Participating Faculty	<input type="text" value="0"/>
Eligible Postdocs with Participating Faculty	<input type="text" value="0"/>
TGE Postdocs Supported by this Training Grant	<input type="text" value="0"/>
<input type="button" value="Save and Close"/>	<input type="button" value="Clear"/>

Select the **Save and Close** button to save the information.

## 7.1.4 Participating Department/Program Detail (Renewal)

### 7.1.4.1 Edit Departments & Programs

To edit a program or department, select the **Edit** button from the **Actions** column.



Participating Departments and Programs ⓘ

Add Participating Departments or Programs

Showing 1 - 2 of total 2

Department or Program Name	Type	Actions
CENTER FOR VACCINE BIOLOGY AND IMMUNOLOGY/SCHOOL OF MEDICINE AND DENTISTRY	Department	<a href="#">Edit</a> <a href="#">Remove</a>
NEUROSURGERY/SCHOOL OF MEDICINE AND DENTISTRY	Department	<a href="#">Edit</a> <a href="#">Remove</a>

Update the Census information as necessary.

#### Faculty

- Total
- Participating


#### Predotorates

- Total
- Supported by any HHS Training Award
- Students with Participating Faculty
- Eligible Students with Participating Faculty
- TGE Predocs Supported by this Training Grant
- Predocs Supported by this Training Grant (R90 Only)

#### Postdoctorates

- Total
- Supported by any HHS Training Award
- Postdocs with Participating Faculty
- Eligible Postdocs with Participating Faculty

- TGE Postdocs Supported by this Training Grant
- Postdocs Supported by this Training Grant (R90 Only)

Prepare Research Training Dataset (RTD) for Renewal	
RTD	5T32CA999999-40 Tumor Cell Biology Training Program
PD/PI	Hope, Bob
Participating Department/Program Detail 	
Waldenstrom macroglobulinemia	
Census	
Faculty	
Total	<input type="text" value="0"/>
Participating	<input type="text" value="0"/>
Predoctorates	
Participating	<input type="text" value="0"/>
Supported by any HHS Training Award	<input type="text" value="0"/>
Students with Participating Faculty	<input type="text" value="0"/>
Eligible Students with Participating Faculty	<input type="text" value="0"/>
TGE Predocs Supported by this Training Grant	<input type="text" value="0"/>
Postdoctorates	
Total	<input type="text" value="0"/>
Supported by any HHS Training Award	<input type="text" value="0"/>
Postdocs with Participating Faculty	<input type="text" value="0"/>
Eligible Postdocs with Participating Faculty	<input type="text" value="0"/>
TGE Postdocs Supported by this Training Grant	<input type="text" value="0"/>
<input type="button" value="Save and Close"/>	<input type="button" value="Clear"/>

Select the **Save and Close** button to save the information.

## 7.2 Training Support & Summary (Renewal)

### 7.2.0.1 Summary Statistics

Displays the read-only totals of the following:

- Average Grant Support per Participating Faculty Member
- Total Number of Predoc Positions
- Total Number of Postdoc Positions
- Total Number of Short-Term Positions

The **Average Grant Support per Participating Faculty Member** is the mean of the Current Year Direct Costs in Research Support for each Faculty member.

The total number of positions represent the sums of the positions entered for each Institution Training Grant.

Prepare Research Training Dataset (RTD) for Renewal

RTD

5T32CA999999-40 Tumor Cell Biology Training Program

PD/PI

Hope, Bob

Training Support & Summary

Summary Statistics

Institutional Training Support Detail

NIH Sources of Support

Showing 1 - 1 of total 1

Grant Title	Award Number	Project Period	PD/PI	Action
Psychometric Integrative Technology for Cognitive Health Research	R01AG999999-01	09/2015 to 05/2020		<div>EditRemove</div>

Add Institutional Training Support

Census Totals

## 7.2.1 Institutional Training Support

To add currently active, federal institutional training, career development, or research education support available to the participating faculty members:

1. Select the **Add Institutional Training Support** button in the **Institutional Training Support Detail** section.

**Training Support & Summary** ?

Summary Statistics

Institutional Training Support Detail

NIH Sources of Support

Showing 1 - 1 of total 1

Grant Title	Award Number	Project Period	PD/PI	Action
Integrative Immunology Training Program	T32AI999999-37	07/1980 to 05/2019		<a href="#">Edit</a> <a href="#">Remove</a>

**Add Institutional Training Support**

Census Totals

2. Search for support by entering any of the criteria on the *Add Institutional Training Support* pop-up. You must enter either an IC Code or PD/PI Last Name.
  - Activity Code
  - IC Code
  - Serial Number
  - Suffix Code
  - Start Date
  - End Date
  - PD/PI Last Name
  - Institution

---

**Tip:** As you type an institution name, a drop-down list of potential matches will begin to populate. Select the institution from that list.

---

3. Select the **Search Funding Sources** button.

The screenshot shows a web application window titled "Add Institutional Training Support". Inside, there is a section titled "Search NIH Funding Sources". Below this title is a "Search Criteria" section with several input fields: "Activity Code", "IC Code" (marked with a red asterisk), "Serial Number", "Suffix Code", "Start Date (mm/dd/yyyy)", "End Date (mm/dd/yyyy)", "PD/PI Last Name" (marked with a red asterisk), and "Institution". At the bottom of the search criteria section are three buttons: "Search Funding Sources" (highlighted with a red circle), "Clear", and "Cancel". A "Close" button is located at the bottom right of the window.

4. From the result list, click the **Select** link from the **Action** column for the correct project.

The added source of support will display on the *Training Support and Summary* screen.

Use the **Edit** and **Remove** links next to the record to update or remove the funding source as necessary.

Additional detail can be found in the [Institutional Training Support Detail](#) section.

## 7.2.2 Census Totals

Displays totals for Faculty, Predoctorates, and Postdoctorates.

### Faculty

- Total
- Participating

Use the **Edit** button to add to or update the numbers for unique faculty members across participating departments and interdepartmental programs.

### Predoc

The following read-only information is displayed. This data is maintained on the **Participating Departments/Programs** section, and the sum totals across **Participating Programs and Departments** are shown here.

- Total
- Supported by any HHS Training Award
- Total Predoctorates with Participating Faculty
- Eligible Students with Participating Faculty
- TGE Predocs Supported by this Training Grant
- Predocs Supported by this Training Grant (R90 Only)

### **Postdoc**

The following read-only information is displayed. This data is maintained on the **Participating Departments/Programs** section, and the sum totals across **Participating Programs and Departments** are shown here.

- Total
- Supported by any HHS Training Award
- Total Postdoctorates with Participating Faculty
- Eligible Postdocs with Participating Faculty
- TGE Postdocs Supported by this Training Grant
- Postdocs Supported by this Training Grant (R90 Only)

### **7.2.3 Institutional Training Support Detail (Renewal)**

Select the **Edit** link on the **Institutional Training Support** section of the *Training Support & Summary* to open the *Editing* screen.



Prepare Research Training Dataset (RTD) for Renewal	
RTD	5T32CA999999-40 Tumor Cell Biology Training Program
PD/PI	Parton, Dolly
Institutional Training Support Detail ?	
Project Title:	Psychometric Integrative Technology for Cognitive Health Research
Grant Number:	R01AG999999-01
<div> <div>+</div> <div>Number of Trainee Positions</div> </div>	
Number of Predoc Positions	0
Number of Postdoc Positions	0
Number of Short-Term Positions	0
Number of Participating Faculty	0
<div>Edit</div>	
<div> <div>+</div> <div>Overlapping Faculty</div> </div>	
Number of Overlapping Faculty	0
Showing 0 to 0 of 0 entries	
Overlapping Faculty Name	Action
No data available in table	
<div>Add Overlapping Faculty</div>	

### 7.2.3.1 Number of Trainee Positions

Use this section to add the number of Predoc, Postdoc, Short-term, and Participating Faculty positions.

1. Select the **Edit** button.
2. In the *Institutional Training Support* pop up, enter the appropriate totals.
3. Click the **Save** button.

### 7.2.3.2 Overlapping Faculty

Use this section to update the number of overlapping faculty.

1. Select the **Add Overlapping Faculty** button.

Personal Profile Status Prior Approval RPPR xTrain xTRACT Admin Supp eRA Partners

Training Grants Persons Institution Data

**Prepare Research Training Dataset (RTD) for Renewal**

**RTD** 5T32CA999999-40 Tumor Cell Biology Training Program

**PD/PI** Parton, Dolly

**Institutional Training Support Detail** ?

**Project Title:** Psychometric Integrative Technology for Cognitive Health Research

**Grant Number:** R01AG999999-01

+ Number of Trainee Positions

+ Overlapping Faculty

**Number of Overlapping Faculty** 0

Showing 0 to 0 of 0 entries

Overlapping Faculty Name	Action
No data available in table	

**Add Overlapping Faculty**

2. In the **Action** column, select **Add Overlapping Faculty** for any participating faculty members that are also on the Institution Training Grant. If a needed faculty member does not display in the results, then add the faculty member as Participating Faculty as described in the topic titled *Participating Faculty Members (Renewal)* on Page 89 for renewal applications.

The **Action** column updates with the word *Added*.

Add Overlapping Faculty

Person Name	Commons User ID	Person ID	Email	Action
White, Snow	WHITES	1234567	eRATest@mail.nih.gov	Add Overlapping Faculty
Black, Jack	BLACKJ	2345678	eRATest@mail.nih.gov	Add Overlapping Faculty
Smith, Black	SMITHB	3456789	eRATest@mail.nih.gov	Add Overlapping Faculty
Smith, Blue	SMITHBL	4567890	eRATest@mail.nih.gov	Add Overlapping Faculty
Light, Bud	LIGHTB	5678901	eRATest@mail.nih.gov	Add Overlapping Faculty
Crosby, Bing	CROSBYB	6789012	eRATest@mail.nih.gov	Add Overlapping Faculty
Thomas, Danny	THOMASD	7890123	eRATest@mail.nih.gov	Add Overlapping Faculty
Thomas, Marlo	THOMASM	8901234	eRATest@mail.nih.gov	✓Added

Close

3. Select the **Close** button.

The Overlapping Faculty Name displays on the *Institutional Training Support Detail* screen with the option to **Remove** the overlapping faculty member. The updated total count of the overlapping faculty is calculated by system and is displayed as read-only.

### 7.3 Participating Faculty Members (Renewal)

Displays the participating faculty added to the RTD - or a message indicating that no faculty have been added, when appropriate.

#### 7.3.1 Add Faculty

To add faculty, select the **Add Faculty Member** button.

**NOTE:** Up to two faculty members may be associated with a student. If there already two faculty members already listed, then the **Add Faculty Member** button does not display. To change a faculty member, delete the appropriate one first and then add the new one.

1. Use the parameters on the *Search for Person(s)* window to find the faculty member. To look outside your institution, uncheck the box titled **Search for persons who have a Commons affiliation with my institution**.

**NOTE:** You must enter a Commons ID, Person ID, or Last Name to perform a search.

2. Select the **Search Persons** button.

**Search for Faculty**

**Search Criteria**

\* Either Commons User ID or Person ID or Last Name is required to perform person search.

\* Commons User ID

\* Person ID

First Name

Middle Name

\* Last Name

Shorts%

☒ Search for persons who have a Commons affiliation with my institution

You can perform a wildcard search on Commons ID or Last Name, by using the "%" character.  
For example: abcd% or %abcd% or ab%cd%.

Search Persons Clear

Close

3. All matching records display in the **Person(s)** table. Select the **Add Faculty** button to add the person to the RTD.

When the **Add Faculty** button is clicked, the **Action** column will display the word *Added*.

Search for Faculty

Search Criteria

Search Results

Persons

Filter:

Showing 1 - 2 of total 2

Show

10

per page

< 1 >

Person Name	Commons User ID	Person ID	Commons Institution	Email	Action
Shorts, Bill	SHORTSB	1234567	UNIVERSITY OF ROCHESTER	eRATest@mail.nih.gov	Added
Shorts, Jim	SHORTSJ	7654321	UNIVERSITY OF ROCHESTER	eRATest@mail.nih.gov	Add Faculty

Looking for a Person but don't see that person listed? You can [create a new xTRACT person record here.](#)

Close

4. Search for and add other faculty as necessary, repeating the steps above.
  - a. Once two faculty members are added, the ability to add more is disabled.
5. Use the **Close** button to close the search screen when finished.

### 7.3.2 Edit Faculty

Use the **Edit** link in the **Actions** column to edit the participating faculty detail for the selected member. Refer to the topic titled *Participating Faculty Detail (Renewal)* on Page 91.

### 7.3.3 Remove

Select the **Remove** link in the **Actions** column to remove the faculty member from the RTD. At the confirmation, select **Yes**.

### 7.3.4 Participating Faculty Detail (Renewal)

Use the + plus icon next to each individual sections of the *Participating Faculty Detail*. The **Open All Sections** link reveals all collapsed sections at once.

Prepare RTD for a Renewal

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December 09, 2016

Prepare Research Training Dataset (RTD) for Renewal

RTD 5T32CA999999-40 Tumor Cell Biology Training Program

PD/PI Parton, Dolly

Participating Faculty Detail ?

Whiplash, Snidely

+ Open All Sections

Faculty Member Data

Commons User ID:

Email: eRATest@mail.nih.gov

Rank:

Primary Department or Program:

Research Interest:

Training Role(s):

Edit

+ Faculty Degree

+ Research Support

+ Mentoring Record

Each section provides a means for editing the information. Refer to the steps below.

#### 7.3.4.1 Faculty Member Data

Use the + plus icon in the **Faculty Member Data** panel of the *Participating Faculty Detail* to display faculty data as described below.

- **Commons User ID** (read only)
- **Email** (read only)
- **Rank**
- **Primary Department or Program**

- **Research Interest**
- **Training Role(s)**

Use the **Edit** button to open the fields in a pop-up for editing. Select **Save** to save your changes.

#### **7.3.4.2 Faculty Degree**

From this panel, you may add a degree, edit a degree, or select a degree to add to an RTD.

The **Source** of degrees is displayed as read-only as *xTRACT* (meaning that the degree was added to the person in xTRACT) or as *Commons Profile* (meaning that the degree is from the Commons Personal Profile of the person).

##### **Add a Degree**

1. Select the **Add Degree** button.
2. Update the fields in the *Add a Degree* pop-up:
  - **Degree:** Select from the list
  - **Other Degree Text:** Enter if the Degree selected is *OTH* (*other type of degree*) or an other category like *BOTH*, *DDOT*, *DOTH*, *MDOT*, *MOTH*, and *VDOT*.
  - **Degree Date:** Enter in MM/YYYY format
  - **Terminal Degree:** Select the **Yes** or **No** radio button as appropriate. When the **Yes** button is selected, the terminal degree indicator (*This is the terminal degree of this person.*) displays next to the degree details in the view. Only one degree for a person can be set as the Terminal Degree.
  - **Degree Status:** Completed or In Process are the selections available for Faculty degrees.
  - **Include in RTD:** Yes or No are the options available.
  - **Degree Institution:** Enter the institution name, one institution per degree. Start typing in some of the institution's name and a drop-down menu displays with related institution names.
3. Select the **Save** button to save your changes.
4. Repeat for any additional degrees.

##### **Edit a Degree**

1. Use the **Edit** button next to a listed degree to display the *Edit a Degree* pop-up for editing.
2. Update the fields as necessary.
3. Select the **Save** button or click the **Cancel** button.

#### **Include in RTD**

1. Locate the degree you are including in the RTD.
2. Check the **Include in RTD** box for the degree to be displayed in the **Participating Faculty Members Training Table** on the RTD PDF. Up to three degrees can be selected to include in the RTD.

Uncheck the box to exclude the degree.

#### **Delete a Degree**

Select the **Delete** button to delete the degree from the participating faculty detail. Delete degree is not available if the **Source** of the degree is *Commons Profile*, meaning the degree is from the Commons Personal Profile of the person.

### **7.3.4.3 Research Support**

#### **NIH and Other Agency Sources of Support**

Includes the NIH Grant number, Role on Project or Subproject, Project Title, Project Period, and Current Year Direct Costs. This information is displayed as read-only.

#### **Other Sources of Support**

Includes Funding Source, Support Type, Project Number, Project Role, Project Title, Project Period, and Current Year Direct Costs.

To add additional support:

1. Select the **Add Another Source of Support** button to display fields for searching/editing to add a non-NIH funding source.
2. Search for a funding source:
  - a. Search for support entering the parameters given and selecting **Search Funding Sources** button.
  - b. From the result list, click the **Select** link from the **Action** column for the correct project.
3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
4. Enter current year direct costs.
5. Select **Save**.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary.



#### 7.3.4.4 Mentoring Record

Use the + plus icon in the **Mentoring Record** panel of the *Participating Faculty Detail* to display counts of trainees mentored.

- Predocs In Training
- Predocs Graduated
- Predocs Continued in Research or Related Careers
- Postdocs in Training
- Postdocs Completed Training
- Postdocs Continued in Research or Related Careers

Use the **Edit** button to open the fields in a pop-up for editing. Save your changes by selecting the **Save** button on the pop-up.

### 7.4 Students (Renewal)

If both Predoc and Postdoc participating trainees are included in the RTD for the Renewal, this menu item will not be available. If only Predoc trainees are included, then Postdoc Students can be added. If only Postdoc trainees are included, then Predoc Students can be added.

This section displays the students added to the RTD - or a message indicating that none has been added, when appropriate. From this screen, you can add, edit, and remove students.

Prepare Research Training Dataset (RTD) for Renewal

RTD

5T32HD999999-15 Human and Molecular Development Training Grant

PD/PI

Parton, Dolly

Students ?

Add Student

Showing 1 - 1 of total 1

Person Name	Commons User ID	Person ID	Student Type	Action
Rogers, Kenny	ROGERSK	1234567	Pre-doc	<div>Edit</div> <div>Remove</div>

Students(s) are listed in a table at the bottom of the screen along with the following information:

- **Student Name**
- **Commons User ID** (if available)
- **Person ID**
- **Student Type:** Pre-doc or Post-doc
- **Actions**
  - The **Edit** link opens the *Student Detail* for the selected trainee. Refer to the topic titled *[Student Detail for a Renewal \(Renewal\) on Page 98](#)*.
  - The **Remove** link removes the person from the RTD.

The **Add Student** feature allows you to search for and add students or create new xTRACT persons to add to the RTD.

### 7.4.1 Add Student

To add a student:

1. Select the **Add Student** button.
2. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled **Search for persons who have a Commons affiliation with my institution**.

---

**NOTE:** You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

---

3. All matching records display in the **Person(s)** table. Select the **Add Student as** link in the **Action** column to add the person.

---

**NOTE:** After you perform a search, the **Create a new xTRACT Person here** link is enabled. Use this link to create an xTRACT person record. Refer to the topic titled *[Create xTRACT Person on Page 184](#)*

---

4. Select the **Student Type** from the pop-up box.
5. Repeat to add other students. Added students appear in the **Person(s)** list with the word *Added* shown in the **Action** column.
6. Use the **Close** button to close the search screen.

Search for Students

Search Criteria

★ Either Commons User ID or Person ID or Last Name is required to perform person search.

★ Commons User ID

★ Person ID

First Name

Middle Name

★ Last Name

☒ Search for persons who have a Commons affiliation with my institution

You can perform a wildcard search on Commons ID or Last Name, by using the "%" character.  
 For example: abcd% or %abcd% or ab%cd%.

Search Persons

Clear

Close

Search for Students

Search Criteria

Search Results

Persons

Showing 1 - 2 of total 2

Filter:

Show

10

per page

« 1 »

Person Name	Commons User ID	Person ID	Commons Institution	Email	Action
Bond, James	BONDJ	1234567	UNIVERSITY OF ROCHESTER	eRATest@mail.nih.gov	Add Student as ▾
Bond, Secure	BONDS	7654321	UNIVERSITY OF ROCHESTER	eRATest@mail.nih.gov	✓Added

Looking for a Person but don't see that person listed? You can [create a new xTRACT person record here.](#)

Close

## 7.4.2 Edit Student

From the list of students, select the **Edit** link in the **Actions** column to edit the student detail.

Refer to the topic titled *Student Detail for a Renewal (Renewal)* on Page 98.

### 7.4.3 Remove

Select the **Remove** link in the **Actions** column to remove the student from the RTD. At the confirmation, select **Yes**.

### 7.4.4 Student Detail for a Renewal (Renewal)

Use the + plus sign icon to display individual sections of the *Student Detail*. The **Open All Sections** link reveals all collapsed sections at once.

Prepare Research Training Dataset (RTD) for Renewal

RTD	5T32HD999999-15 Human and Molecular Development Training Grant
PD/PI	Parton, Dolly

Student Detail ⓘ  
Rogers, Kenny (Pre-doc)

[+ Open All Sections](#)

Student Data

Commons User ID:	ROGERSK
Email:	eRATest@mail.nih.gov

+ In Training Data

+ Faculty Members

+ Degrees

+ Post-Training Positions

+ Subsequent Grants

+ Publications

Each section provides a means for viewing or editing the information. Refer to the steps below.

#### 7.4.4.1 Student Data

Use the + plus sign icon in the **Student Data** panel of the *Student Detail* to display the following read-only information:

- Commons User ID or Person ID
- Email

#### 7.4.4.2 In Training Data

Use the + plus sign icon in the **In Training Data** panel of the *Student Detail* to display in training data as described below. Use the **Edit** button to open the fields in a pop-up for editing.

- In Training
- Type
- Research Topic
- Start Date
  - Into Current Degree-Granting Program, for a Predoctoral trainee
  - Into Postdoctoral Research, for Postdoctoral trainee
- End Date (when Trainee Left Program)

#### 7.4.4.3 Faculty Members

Displays the faculty members for the student on the RTD.

To add faculty, select the **Add Faculty Member** button.

---

**NOTE:** Up to two faculty members may be associated with a student. If there already two faculty members already listed, then the **Add Faculty Member** button does not display. To change a faculty member, delete the appropriate one first and then add the new one.

---

1. Use the parameters on the *Search for Person(s)* window to find the faculty member. To look outside your institution, uncheck the box titled **Search for persons who have a Commons affiliation with my institution**.

---

**NOTE:** You must enter a Commons ID, Person ID, or Last Name to perform a search.

---

2. Select the **Search Persons** button.

Search for Faculty

Search Criteria

★ Either Commons User ID or Person ID or Last Name is required to perform person search.

★ Commons User ID

★ Person ID

First Name

Middle Name

★ Last Name

Shorts%

☒ Search for persons who have a Commons affiliation with my institution

You can perform a wildcard search on Commons ID or Last Name, by using the "%" character.  
For example: abcd% or %abcd% or ab%cd%.

Search Persons

Clear

Close

- All matching records display in the **Person(s)** table. Select the **Add Faculty** button to add the person to the RTD.

When the **Add Faculty** button is clicked, the **Action** column will display the word *Added*.

Search for Faculty

Search Criteria

Search Results

Persons

Filter:

Showing 1 - 2 of total 2

Show

10

per page

<

1

>

Person Name	Commons User ID	Person ID	Commons Institution	Email	Action
Shorts, Bill	SHORTSB	1234567	UNIVERSITY OF ROCHESTER	eRATest@mail.nih.gov	✓Added
Shorts, Jim	SHORTSJ	7654321	UNIVERSITY OF ROCHESTER	eRATest@mail.nih.gov	Add Faculty

Looking for a Person but don't see that person listed? You can [create a new xTRACT person record here](#).

Close

4. Search for and add other faculty as necessary, repeating the steps above.
  - a. Once two faculty members are added, the ability to add more is disabled.
5. Use the **Close** button to close the search screen when finished.

To remove a faculty member from the Student, select the **Delete** link from the **Action** column.

#### 7.4.4.4 Degrees

xTRACT displays a list of completed degrees and associated data.

The **Source** of degrees is displayed as read-only as *xTRACT* (meaning that the degree was added or edited to the person in xTRACT) or as *Commons Profile* (meaning that the degree is from the Commons Personal Profile of the person).

To add a degree:

1. Select the **Add Degree** button.
2. Update the fields in the *Create a New Degree* pop-up:
  - **Degree**: Select from the list
  - **Other Degree Text**: Enter if Degree selected is *OTH* (*other type of degree*) or an other category like BOTH, DDOT, DOTH, MDOT, MOTH, and VDOT.
  - **Degree Date**: Enter in MM/YYYY format
  - **Terminal Degree**: Select the **Yes** or **No** . When **Yes** is selected, the terminal degree indicator (*This is the terminal degree of this person.*) displays next to the degree details in the view. Only one degree per person can be set as the Terminal Degree.
  - **Degree Status**: Select Completed or In Progress, as appropriate
  - **Received in Training**: Select Yes or No. Up to three degrees can be selected as Received in Training.
  - **Degree Institution**: Enter the institution name, one institution per degree. Start typing in some of the institution's name and a drop-down menu displays with related institution names.
3. Select the **Save** button to save the new degree.
4. Repeat for any additional degrees.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the degrees as necessary. Degrees with *Commons Profile* as a **Source** cannot be deleted.

#### 7.4.4.5 Post-Training Positions

Displays post-training positions employment information. The **Source** of positions is displayed as read-only as *xTRACT* (meaning the position was added or updated for the person in xTRACT) or as *Commons Profile* (meaning the position is from the Commons Personal Profile of the person).

To add employment:

1. Select the **Add Employment** button.
2. Provide the following information:
  - **Faculty Teaching Position:** Select from the list
    - Professor; Associate Professor; Assistant Professor; Instructor; Other
  - **Academic Administrative Position:** Select from the list
    - President; Vice President; Dean; Assistant or Associate Dean; Chairperson of Department (or Director); Other
  - **Primary Employment Indicator:** Select the **Yes**, **No**, as appropriate.
  - **Full Time Employment Indicator:** Select **Full-Time** or **Part Time**
  - **Current/Initial Employment Indicator:** Select **Primary Current** or **Primary Initial** or both, as appropriate
  - **Primary Activity:** Select from list
    - Research-intensive; Research-related; Further training; Other
  - **Employment Position:** Enter the position title for the employment. This is required.
  - **Institution:** Use the type a head feature to find the appropriate institution.
  - **Primary Department of Position:** Use the type a head feature to find the appropriate department.
  - **Start Date:** Select a date in MM/YYYY format. This is required.
  - **End Date:** Select a date MM/YYYY format.
3. Select the **Save** button to save the changes.
4. Repeat to add another.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the positions as necessary. Positions with a **Source** of *Commons Profile* cannot be deleted.

#### **7.4.4.6 Subsequent Grants**

##### **NIH Sources of Support**

Includes the NIH Grant number, Project Title, Award Start Date, Period of Support.

**To add additional sources of support under this section:**

1. Enter **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of this person's involvement.
2. Select **Save**.

Use the **Edit** and **Delete** links to update or remove the funding source as necessary.



## Other Sources of Support

Includes Funding Source, Support Type, Project Number, Project Role, and Award Start Date.

### To add additional support:

1. Select the **Add Other Source of Support** button to open the *Add Non-NIH Source of Support* pop-up.

Search for support or create new funding source:

To search:

- a. Search for support entering the parameters given and selecting **Search Funding Sources** button.
- b. From the result list, click the link from the **Action** column for the correct project.

To create:

- a. Select the **Create Funding Source** button.
  - b. Update the fields. Required fields show a red asterisk (\*).
  - c. Select **Save**.
2. Select an option from the **Role during funding** drop-down.
  3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
  4. Select **Save**.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary.

### 7.4.4.7 Publications

To add a publication:

1. Select the **Add Publication** button.
2. From the *Add Publication* pop-up, enter one or more of the **required** information:  
**Commons User ID, Person ID, or Last Name**
  - a. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled **Search for persons who have a Commons affiliation with my institution**.
  - b. All matching records display in the **Person(s)** table. Click the **Add Faculty** button to add the person. This will populate the name into the *Add Publication* pop-up, which will display on your screen once again.

3. Search for a publication by one of the following:
  - a. **PMID/PMCID**
  - b. **First Name, Last Name, or Title**
  - c. Click the **Search** button.
  - d. Click the **Add** button to add the appropriate publication.
  - e. Next select the appropriate **Authors** check boxes.
4. To edit a publication click the **Manual Edit Publication** button.
  - a. Enter the required fields: **Title, Journal, or Authors**.
  - b. Click the **Continue to review & confirm** button.
5. Finally click the **Save** button to save the information. You will see a confirmation at the top of the pop-up.

To indicate no publications, mark the check box titled **Check this box if there are no publications for this trainee**.

After checking the no publications check box, you will be guided through the following steps:

1. Select a reason for **No Publications** from the drop-down list.
2. Search for and select a faculty member.
3. Select the **Save** button to save the information.

Use the **Edit** and **Delete** buttons next to a specific publication to update or remove that record.

## **7.5 Participating Trainees (Renewal)**

Displays the participating trainees added to the RTD - or a message indicating that none has been added, when appropriate. From this screen, you can add, edit, and remove participating trainees.

Prepare Research Training Dataset (RTD) for Renewal

RTD

5T32HD999999-15 Human and Molecular Development Training Grant

PD/PI

Lennon, John

Participating Trainees ?

Add Trainee

Filter:

Showing 1 - 10 of total 42

Show 10 per page

« 1 2 3 4 5 »

Person Name	Commons User ID	Person ID	Trainee Type	Start Date	End Date	Action
Starr, Ringo	STARR	1234567	Post-doc			<a>Edit</a> <a>Remove</a>
Harrison, George	HARRISONG	7654321	Post-doc			<a>Edit</a> <a>Remove</a>

Participating trainee(s) are listed in a table at the bottom of the screen along with the following information:

- **Person Name**
- **Commons User ID** (if available)
- **Person ID**
- **Trainee Type**: Pre-doc; Post-doc; Short Term
- **Start Date**
- **End Date**
- **Actions**
  - The **Edit** link opens the *Participating Trainee Detail* for the selected trainee. Refer to the topic titled [Participating Trainee Detail \(Renewal\)](#) on Page 106.
  - The **Remove** link removes the person from the RTD.

The **Add Trainee** feature allows you to search for and add existing trainees or create new xTRACT persons to add to the RTD.

### 7.5.1 Add Trainee

To add a trainee:

1. Select the **Add Trainee** button.
2. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled **Search for persons who have a Commons affiliation with my institution**.

---

**NOTE:** You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

---

3. All matching records display in the **Person(s)** table. Select the **Add Trainee** link in the **Action** to add the person.

---

**NOTE:** After you perform a search, the **Create xTRACT Person** button is enabled. Use this button to create an xTRACT Person record. Refer to the topic titled [Create xTRACT Person on Page 184](#)

---

4. Select the **Trainee Type** from the pop-up box: Pre Doctoral, Post Doctoral, or Short Term and click **OK**.
5. Repeat for any to add other students. Added students appear in the **Person(s)** list with the word *Added* shown in the **Action** column.
6. Use the **Close** button to close the search screen.

### 7.5.2 Edit Trainee

From the list of trainees, select the **Edit** link in the **Actions** column to edit the trainee detail for the selected trainee.

Refer to the topic titled [Participating Trainee Detail \(Renewal\)](#) on Page 106.

### 7.5.3 Remove

Select the **Remove** link in the **Actions** column to remove the trainee from the RTD. At the confirmation, select **Yes**.

### 7.5.4 Participating Trainee Detail (Renewal)

While preparing an RTD for a Renewal, you can open the *Participating Trainee Detail* for a trainee by selecting that trainee's **Edit** link. The *Participating Trainee Data* for the selected person is grouped into panels. Use the + plus sign icon and **Edit** buttons and links to display and edit the information as detailed below.

**Prepare Research Training Dataset (RTD) for Renewal**

<b>RTD</b>	5T32HD999999-15 Human and Molecular Development Training Grant
<b>PD/PI</b>	Bond, James

**Participating Trainee Detail** ⓘ  
Penny, Money (Post-doc)

[+ Open All Sections](#)

**Trainee Data**

**Commons User ID:** PENNYM

**Email:** eRATest@mail.nih.gov

- In Training Data**
- Faculty Members
- Support During Training
- Degrees
- Post-Training Positions
- Subsequent Grants
- Publications

**IMPORTANT:** The information displayed in the trainee detail is comprised of information pulled from the trainee's eRA Commons Personal Profile, where available. However, updates made to the xTRACT trainee detail will not update that trainees Personal Profile in Commons.

#### 7.5.4.1 Trainee Data

Use the **View** link in the **Trainee Data** panel of the *Participating Trainee Detail* to display the following read-only information, as applicable:

- Person ID or Commons ID
- Email

#### 7.5.4.2 In Training Data

Use the **View** link in the **In Training Data** panel of the *Participating Trainee Detail* to display in training data as described below. Use the **Edit** button to open the fields in a pop-up for editing.

- In Training
- Type
- Research Topic
- Start Date
  - Current Degree-Granting Program for a Predoctoral trainee
  - Postdoctoral Research for Postdoctoral trainee
- End Date (when Trainee Left Program)

---

**NOTE:** In order to finalize the RTD for an RPPR, all trainees must have a start date in the **In Training Data** section. Additionally, trainees with *No* selected for **In Training** status must have an end date.

---

### 7.5.4.3 Faculty Members

Displays the participating faculty added to the RTD.

To add faculty, select the **Add Faculty Member** button.

---

**NOTE:** Up to two faculty members may be associated with a student. If there already two faculty members already listed, then the **Add Faculty Member** button does not display. To change a faculty member, delete the appropriate one first and then add the new one.

---

1. Use the parameters on the *Search for Person(s)* window to find the faculty member. To look outside your institution, uncheck the box titled **Search for persons who have a Commons affiliation with my institution.**

---

**NOTE:** You must enter a Commons ID, Person ID, or Last Name to perform a search.

---

2. Select the **Search Persons** button.

Search for Faculty

Search Criteria

★ Either Commons User ID or Person ID or Last Name is required to perform person search.

★ Commons User ID

★ Person ID

First Name

Middle Name

★ Last Name

Shorts%

☒ Search for persons who have a Commons affiliation with my institution

You can perform a wildcard search on Commons ID or Last Name, by using the "%" character.  
For example: abcd% or %abcd% or ab%cd%.

- All matching records display in the **Person(s)** table. Select the **Add Faculty** button to add the person to the RTD.

When the **Add Faculty** button is clicked, the **Action** column will display the word *Added*.

Search for Faculty

Search Criteria

Search Results

Persons

Filter:

Showing 1 - 2 of total 2

Show

10

per page

<

1

>

Person Name	Commons User ID	Person ID	Commons Institution	Email	Action
Shorts, Bill	SHORTSB	1234567	UNIVERSITY OF ROCHESTER	eRATest@mail.nih.gov	✓Added
Shorts, Jim	SHORTSJ	7654321	UNIVERSITY OF ROCHESTER	eRATest@mail.nih.gov	<input type="button" value="Add Faculty"/>

Looking for a Person but don't see that person listed? You can [create a new xTRACT person record here.](#)

4. Search for and add other faculty as necessary, repeating the steps above.
  - a. Once two faculty members are added, the ability to add more is disabled.
5. Use the **Close** button to close the search screen when finished.

To remove a faculty member from the RTD, select the **Delete** link in the **Action** column.

#### **7.5.4.4 Support During Training**

---

**NOTE:** This section applies to pre-doc and and post-doc trainees only.

---

Sources of support, both within and outside of NIH, can be maintained in this section. Click on the collapsed panel to display the information.

After a start date has been added for the trainee in *In Training Data*, the **Training Years (TYs)** will be displayed as read-only with corresponding abbreviations for funding sources in **Support During Training**.

##### **This NIH Training Grant**

Includes the NIH Grant number , Project Title, Period of Support.

Click the **Add This NIH Source of Support** to add support from **This NIH Training Grant**. Enter the **Start of Funding** and **End of Funding**. To remove support from **This NIH Training Grant**, select **Delete All from This NIH Funding Source of Support**.

##### **NIH and Other Agency Sources of Support**

Includes the NIH or Other Agency Grant number, Project Title, Period of Support.

To add additional NIH or Other Agency support:

1. Select the search icon next to **Funding Source** to open query fields.
  - a. Enter search criteria in the fields.
  - b. Select the **Search Funding Sources** button.
  - c. From the list, select the funding source by clicking the appropriate **Select** link in the **Action** column.
2. Enter **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of this person's involvement.
3. Enter the **Other role description** if *Other* was selected for **Role during funding**.
4. Select **Save**.
5. Repeat the search to add more.

Use the **Edit** and **Delete** links to update or remove the funding source as necessary.

##### **Other Sources of Support**

Includes Funding Source, Support Type, Project Number, Project Role, and Award Start



Date.

To add additional support:

1. Select the **Add Other Source of Support** button to open the *Edit/Add Sources of Support* pop-up.

Search for support or create new funding source:

To search:

- a. Search for support entering the parameters given and selecting **Search Funding Sources** button.
- b. From the result list, click the link from the **Action** column for the correct project.

To create:

- a. Select the **Create Funding Source** button.
  - b. Update the fields. Required fields show a red asterisk (\*).
  - c. Select **Save**.
2. Select an option from the **Role during funding** drop-down.
  3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
  4. Enter the **Other role description** if *Other* was selected for **Role during funding**.
  5. Select **Save**.
  6. Repeat the search to add more.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary.

#### 7.5.4.5 Degrees

xTRACT displays a list of completed degrees and associated data in reverse chronological order, with incomplete degrees following.

To add a degree:

1. Select the **Add Degree** button.
2. Update the fields in the *Create a New Degree* pop-up:
  - **Degree**: Select from the list
  - **Other Degree Text**: Enter the name of the degree if an *OTH* type of degree was selected.
  - **Degree Date**: Enter in MM/YYYYY format

- **Terminal Degree:** Select the **Yes** or **No** as appropriate. When **Yes** is selected, the terminal degree indicator (*This is your terminal degree.*) displays next to the degree details in the view. A person can only have one terminal degree.
  - **Degree Status:** Select Completed or In Progress, as appropriate
  - **Received in Training:** Select Yes or No. Up to three degrees can be set as Received in Training.
  - **Degree Institution:** Enter the institution name, one institution per degree. You can search for an institution by selecting the magnifying glass search icon.
3. Select the **Save** button to save your changes.
  4. Repeat for any additional degrees.
  5. Select the **Close** button when finished.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the degree(s) as necessary. Degrees *Commons Profile* as the **Source** cannot be deleted.

#### **7.5.4.6 Post-Training Positions**

Displays post-training positions employment information.

To add employment:

1. Select the **Add Employment** button.
2. Provide the following information:
  - **Faculty Teaching Position:** Select from the list:
    - Professor; Associate Professor; Assistant Professor; Instructor; Other
  - **Academic Administrative Position:** Select from the list:
    - President; Vice President; Dean; Assistant or Associate Dean; Chairperson of Department (or Director); Other
  - **Primary Employment Indicator:** Select the **Yes** or **No**.
  - **Full Time Employment Indicator:** Select **Full-Time** or **Part-Time**
  - **Current/Initial Employment Indicator:** Select **Primary Current** or **Primary Initial**
  - **Primary Activity:** Select from list
    - Research-intensive; Research-related; Further training; Other
  - **Employment Position**
  - **Institution:** Enter the institution or select the icon to open a search box
  - **Primary Department of Position:** Enter the department or select the icon to open a search box

- **Start Date:** Select a date in MM/YYYY format.
  - **End Date:** Select a date MM/YYYY format.
3. Select the **Save** button to save your changes.
  4. Repeat to add another.
  5. Select **Close** to close the window.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the position(s) as necessary. Positions with *Commons Profile* as the **Source** cannot be deleted.

#### 7.5.4.7 Subsequent Grants

##### NIH and other Agency Sources of Support

Includes the NIH or Other Agency Grant number, Project Title, Period of Support.

To add additional NIH or Other Agency Support:

1. Select the search icon next to **Funding Source** to open query fields.
  - a. Enter search criteria in the fields.
  - b. Select the **Search Funding Sources** button.
  - c. From the list, select the funding source by clicking the appropriate **Select** link in the **Action** column.
2. Enter **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of this person's involvement.
3. Select **Save**.
4. Repeat the search to add more.

Use the **Edit** and **Delete** links to update or remove the funding source as necessary.

##### Other Sources of Support

Includes Funding Source, Support Type, Project Number, Project Role, and Award Start Date.

To add additional support:

1. Select the **Add Other Source of Support** button to open the *Edit/Add Sources of Support* pop-up.

Search for support or create new funding source:

To search:

- a. Search for support entering the parameters given and selecting **Search Funding Sources** button.
- b. From the result list, click the link from the **Action** column for the correct project.

To create:

- a. Select the **Create Funding Source** button.
  - b. Update the fields. Required fields show a red asterisk (\*).
  - c. Select **Save**.
2. Select an option from the **Role during funding** drop-down.
  3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
  4. Select **Save**.
  5. Repeat the search to add more.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary.

#### **7.5.4.8 Publications**

To add a publication:

1. Select the **Add Publication** button.
2. From the *Add Publication* pop-up, enter one of more of the **required** information:  
**Commons User ID, Person ID, or Last Name**
  - a. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled **Search for persons who have a Commons affiliation with my institution**.
  - b. All matching records display in the **Person(s)** table. Click the **Add Faculty** button to add the person. This will populate the name into the *Add Publication* pop-up, which will display on your screen once again.
3. Search for a publication by one of the following:
  - a. **PMID/PMCID**
  - b. **First Name, Last Name, or Title**
  - c. Click the **Search** button.
  - d. Click the **Add** button to add the appropriate publication.
  - e. Next select the appropriate **Authors** check boxes.

4. To edit a publication click the **Manual Edit Publication** button.
  - a. Enter the required fields: **Title**, **Journal**, or **Authors**.
  - b. Click the **Continue to review & confirm** button.
5. Finally click the **Save** button to save the information. You will see a confirmation at the top of the pop-up.

To indicate no publications, mark the check box titled **Check this box if there are no publications for this trainee**.

After checking the no publications check box, you will be guided through the following steps:

1. Select a reason for **No Publications** from the drop-down list.
2. Search for and select a faculty member.
3. Select the **Save** button to save the information.

Use the **Edit** and **Delete** buttons next to a specific publication to update or remove that record.

## 7.6 Program Statistics (Renewal)

The Program statistics information is accessed via the left-side menu.



In cases where a prior RTD exists for the application, the option to copy from the prior RTD(s) will display. If none are available, only the **Save** and **Clear** buttons will show.

Prepare Research Training Dataset (RTD) for Renewal

RTD

4T32AA007453-35 Interdisciplinary Alcohol Research Training Program

PD/PI

Cornelius, Marie D.

Program Statistics ?

Are program statistics applicable for this reporting period? ☒ Yes ☐ No

\* Percentage of Trainees Entering Graduate School 10 Years Ago Who Completed the Ph.D.

0.0 %

\* Average Time to Ph.D. for Trainees in the Last 10 Years (not including leaves of absence)

0.0 Year(s)

Save

Clear

The **Program Statistics** section is only available for training grants that have Predoctorate Trainees.

1. Enter the program statistics as follows:
  - Percentage of Trainees Entering Graduate School 10 Years Ago Who Completed the Ph.D.
  - Average Time to Ph.D. for Trainees in the Last 10 Years (not including leaves of absence)
2. Select the **Save Program Statistics** button.

Use the checkbox to indicate that **Program Statistics are not applicable for this reporting period**.

## 7.7 Appointments (Renewal)

Displays the training positions awarded and appointed, separately within two tables.

Prepare Research Training Dataset (RTD) for Renewal

RTD

4K12HD999999-20 UCLA Child Health Research Career Development Award

PD/PI

Potter, Harry

Appointments ?

Training Positions Awarded

					Sum of Budget Years
Predoctoral Awarded	0	0	0	0	0
Postdoctoral Awarded	0	0	0	0	0
Short-Term Awarded	0	0	0	0	0

Training Positions Appointed

					Sum of Budget Years
Predoctoral Appointed					
Predoc Dual Degree					
Predoc Diverse Backgrounds					
Postdoctoral Appointed					
Postdoc MD or Equivalent					
Postdoc PhD or Equivalent					
Postdoc DDS, DVM, Other					
Postdoc Dual Degree					
Postdoc Diverse Backgrounds					
Short-Term Appointed					
Short-Term Diverse Backgrounds					

Edit Appointments

### 7.7.1 Training Positions Awarded

The **Training Positions Awarded** table shows the number of awarded Predoctoral, Postdoctoral, and Short-Term appointments for each budget year. The last column of the table shows the sum of each appointment over all budget years.

This information is read-only.

### 7.7.2 Training Positions Appointed

The **Training Positions Appointed** table shows the number of appointed training positions for each budget year. The last column of the table shows the sum of each appointment over all budget years. Training positions include:

- Predoctoral Appointed
- Predoc Dual Degree
- Predoc Diverse Backgrounds
- Postdoctoral Appointed
- Postdoc MD or Equivalent
- Postdoc PhD or Equivalent
- Postdoc DDS, DVM, Other
- Postdoc Dual Degree
- Postdoc Diverse Backgrounds
- Short-Term Appointed
- Short-Term Diverse Backgrounds

Use the **Edit Appointments** button to open the table fields for editing. After updating the fields, select the **Save Appointments** button to save the information.

## 7.8 Applicants and Entrants (Renewal)

To enter Pre-doc and Post-doc applicants and entrants, first enter the start year of the most recently completed academic year and click the **Submit** button.

Select the **Pre-Doc Applicants and Entrants** and **Post-Doc Applicants and Entrants** links to display and enter data for the specific academic year(s).



Prepare Research Training Dataset (RTD) for Renewal	
RTD	5T32HD999999-15 Human and Molecular Development Training Grant
PD/PI	Beach, Sandy

### Applicants and Entrants

Start year of the most recently completed academic year:

*The Pre-doc and Post-doc data may be edited via the links below, once the Start of the most recently completed academic year has been provided.*

[Pre-Doc Applicants and Entrants](#)  
[Post-Doc Applicants and Entrants](#)

To change the most recently-completed academic year, change the year entered and select **Submit**. When changing **Academic** years, any data entered for **Applicant and Entrant Counts and Characteristics** are retained and associated with the shifted year based on order of years (rather than previously specified year).

For example, let's say the first academic year is 2000-2001 and there are applicant/entrant data entered for that year. If the first academic year is changed to 2001-2002 by changing the most recently-completed academic year from 2001 to 2002, the same applicant/entrant data display for that first year.

## 7.8.1 Predoctoral Applicant and Entrant Counts and Characteristics (Renewal)

### 7.8.1.1 Edit the Counts and Characteristics

For each Academic Year, update the *Applicant and Entrant Counts and Characteristics* appropriately. Use the **Edit** buttons provided at the bottom of each table to enter your data. These buttons open up the fields on each table. Enter the data and select the **Save** buttons to save it. Or select **Cancel** to exit editing without saving the changes.

Prepare Research Training Dataset (RTD) for Renewal

RTD

5T32HD999999-15 Human and Molecular Development Training Grant

PD/PI

Bond, James

2016 - 2017

2015 - 2016

2014 - 2015

2013 - 2014

2012 - 2013

Summary

Predoctoral Applicant and Entrant Counts and Characteristics

[+ Open All Sections](#)

Counts: Department or Program

Department or Program	Total Applicant Pool	Applicants Eligible for Support	New Entrants to the Program	New Entrants Eligible for Support	New Entrants Appointed to this Grant
CHEMISTRY AND BIOCHEMISTRY/COLLEGE OF LETTERS AND SCIENCE					
Total	0	0	0	0	0

Edit Counts

+

Characteristics: GPA

+

Characteristics: Research Experience

+

Characteristics: Prior Institutions

+

Characteristics: Diversity

### 7.8.1.2 Counts table

For Predoctoral Applicants and Entrants, Counts are entered by Participating Departments or Program. If a Department or Program is missing, refer to the topic titled [Participating Departments and Programs \(Renewal\) on Page 74](#). The following fields are provided for data entry on each department or program:

- Department or Program (read only)
- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support
- New Entrants Appointed to this Grant

### 7.8.1.3 Characteristics

The following tables exist for Characteristics:

## GPA

Enter the Mean GPA, Lowest GPA, and Highest GPA for the following:

- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support
- New Entrants Appointed to this Grant

## Research Experience

Enter the mean, lowest, and highest number of months of prior, full-time research experience for the following:

- New Entrants to the Program
- New Entrants Eligible for Support
- New Entrants Appointed to this Grant

## Prior Institutions

Use the **Characteristics: Research Experience** section to search and select an institution. Start typing in the Institution field. Select the appropriate institution from the drop-down list. Once the institution is selected and displayed on the table, enter a numeric value in the **New Entrants to the Program** and/or **New Entrants Eligible for Support** fields. Select the **Add Prior Institution** link in the **Action** column.

Use the **Edit** and **Remove** links to modify or remove this data.

- New Entrants to the Program
- New Entrants Eligible for Support
- New Entrants Appointed to this Grant

## Diversity

Enter the percent of entrants with a disability and the percent from under-represented racial and ethnic groups for the following:

- New Entrants to the Program
- New Entrants Eligible for Support
- New Entrants Appointed to this Grant

### 7.8.1.4 Summary of Counts and Characteristics

Select the **Summary** tab to display a summary for predoctoral applicants and entrants. The summary displays the means across all years for the counts and characteristics.

To edit this information, refer to the above section of this topic.

### 7.8.2 Postdoctoral Applicant and Entrant Counts and Characteristics (Renewal)

For each Academic Year, update the *Applicant and Entrant Counts and Characteristics* appropriately. Use the **Edit** buttons provided at the bottom of each table to enter your data. These buttons open up the fields on each table. Enter the data and select the **Save** buttons to save it. Or select **Cancel** to exit editing without saving the changes.

Prepare Research Training Dataset (RTD) for Renewal

RTD

5T32HD999999-15 Human and Molecular Development Training Grant

PD/PI

Whiplash, Snidely

2016 - 2017

2015 - 2016

2014 - 2015

2013 - 2014

2012 - 2013

Summary

Postdoctoral Applicant and Entrant Counts and Characteristics ?

+ Open All Sections

Counts: Degree Types

	Total Applicant Pool	Applicants Eligible for Support	New Entrants to the Program	New Entrants Eligible for Support	New Entrants Appointed to this Grant
PhDs					
MDs					
Dual-Degree Holders					
Other Degree Holders					
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

Edit Counts

Characteristics: Publications

Characteristics: Prior Institutions

Characteristics: Diversity

### 7.8.2.1 *Counts table*

For PhDs, MDs, dual-degree holders, and other degree holders, update the following information:

- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support
- New Entrants Appointed to this Grant

### 7.8.2.2 *Characteristics*

The following tables exist for Characteristics:

#### **Publications**

Enter the mean, lowest, and highest number of publications as well as the mean, lowest, and highest number of first author publications for the following:

- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support
- New Entrants Appointed to this Grant

#### **Prior Institutions**

Use the **Characteristics: Research Experience** section to search and select an institution. Start typing in the Institution field. Select the appropriate institution from the drop-down list. Once the institution is selected and displayed on the table, enter a numeric value in the **New Entrants to the Program** and/or **New Entrants Eligible for Support** fields. Select the **Add Prior Institution** link in the **Action** column.

Use the **Edit** and **Remove** links to modify or remove this data.

- New Entrants to the Program
- New Entrants Eligible for Support
- New Entrants Appointed to this Grant

#### **Diversity**

Enter the percent of entrants with a disability and the percent from under-represented racial and ethnic groups for the following:

- New Entrants to the Program
- New Entrants Eligible for Support
- New Entrants Appointed to this Grant

### 7.8.2.3 Summary of Counts and Characteristics

Select the **Summary** tab to display a summary for postdoctoral applicants and entrants. The summary displays the means across all years for the counts and characteristics.

To edit this information, refer to the above section of this topic.

## 7.9 Preview PDF (Renewal)

Select the **Preview PDF** link to open save, and/or print the training tables. An *In Progress* watermark will be printed on the *Training Table* PDF until the RTD is finalized.

## 7.10 Finalize RTD (Renewal)

Certain users have the ability to finalize the RTD for a training grant. Finalized RTDs are marked as *Final* and cannot be edited.

To finalize an RTD

1. Select the **Finalize RTD** link from the **RTD** links on the left side of the screen.

A confirmation message warns: *Are you sure you want to finalized this RTD? Once finalized, the RTD cannot be edited?*

**IMPORTANT:** Once you finalize, the RTD cannot be edited. Select the **No** button if you do not wish to finalize.

2. Select the **Yes** button to finalize the RTD.

xTRACT generates a PDF version of the training tables without the *In Progress* watermark, updates the status of the RTD to *Final*, and locks the RTD for editing.

You will have the option to view the finalized PDF at any time on the *Search New RTDs* screen and unfinalize the RTD if needed.

If data are needed to finalize the RPPR RTD, the appropriate error message(s) display as follows:

- *Missing Required Data: Start Date in the In Training Data section is required to finalize the RTD. Please enter the missing data and try again.*

- *Missing Required Data: End Date in the In Training Data section is required to finalize the RTD. Please enter the missing data and try again.*

All trainees must have a start date in the **In Training Data** section. Additionally, trainees with **No** selected for **In Training** status must have an end date.

## 8 Prepare RTD for a Revision Application

---

To access the screen:

1. Search for the training grant on the *Search for Training Grants* screen. Refer to the topic titled *Search for Training Grants on Page 7* for steps.
2. From the **Action** column of the search results, select the appropriate link to access the *Prepare for Research Training Data Set (RTD) for Revision* screen:
  - To initiate the RTD for the renewal application: Select the **Prepare for Revision** link.
  - To continue working on an initiated RTD: Select the **Continue for Revision** link.

The *Prepare Research Training Dataset (RTD) for Renewal* screen opens for the selected training grant.

Use the links listed under **RTD** on the left side of the screen to maintain the specific sections of the RTD:

- **Participating Departments/Programs**
- **Training Support & Summary**
- **Participating Faculty**
- **Participating Trainees**
- **Program Statistics**
- **Applicants and Entrants**
- **Appointments**
- **Preview PDF**

Selecting the links above opens the specific section of the RTD. From within, you can add, edit, and/or remove data.

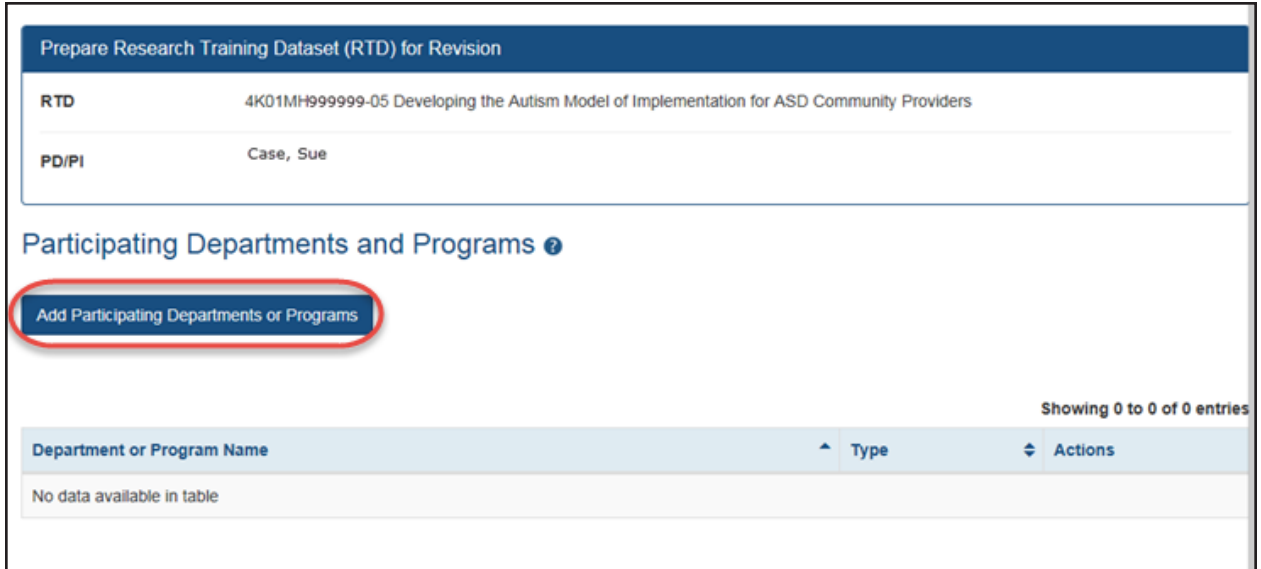
### 8.1 *Participating Departments and Programs (Revision)*

Use this section to add/remove departments and programs.



### 8.1.1 Add Departments

1. Select Participating **Departments/Programs** on the left.
2. Select the **Add Participating Departments or Programs** button.



Prepare Research Training Dataset (RTD) for Revision

RTD 4K01MH999999-05 Developing the Autism Model of Implementation for ASD Community Providers

PD/PI Case, Sue

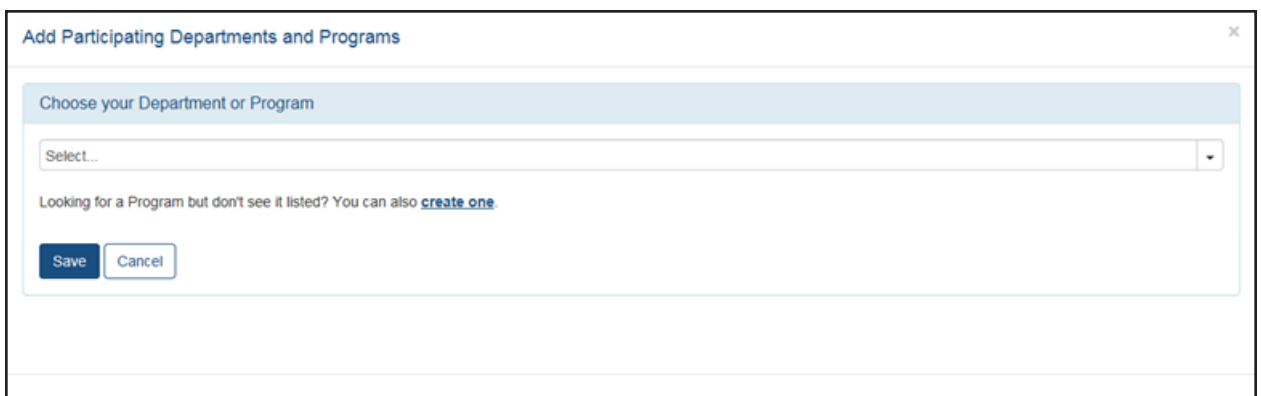
Participating Departments and Programs ?

Add Participating Departments or Programs

Showing 0 to 0 of 0 entries

Department or Program Name	Type	Actions
No data available in table		

3. Start typing in the text box. The system will display a list of departments and programs with that character string in a drop-down menu.
4. Find the appropriate department in the results list drop-down and select the appropriate department. Major Components are also displayed with the Department to differentiate among departments with the same name in different units of the organization.



Add Participating Departments and Programs

Choose your Department or Program

Select...

Looking for a Program but don't see it listed? You can also [create one](#).

Save Cancel

Add Participating Departments and Programs

Choose your Department or Program

acc

CENTER FOR VACCINE BIOLOGY AND IMMUNOLOGY

Save Cancel

5. Select the **Save** button and the department and close the screen.

The *Participating Departments and Programs* screen updates to show the added department(s) in a table. Added programs and departments display in the same table. The **Actions** column includes links for removing and editing the programs and departments.

### 8.1.2 Add Programs

1. Select the **Add Participating Departments or Programs** button.

Prepare Research Training Dataset (RTD) for Revision

RTD 4K01MH999999-05 Developing the Autism Model of Implementation for ASD Community Providers

PD/PI Case, Sue

Participating Departments and Programs ?

Add Participating Departments or Programs

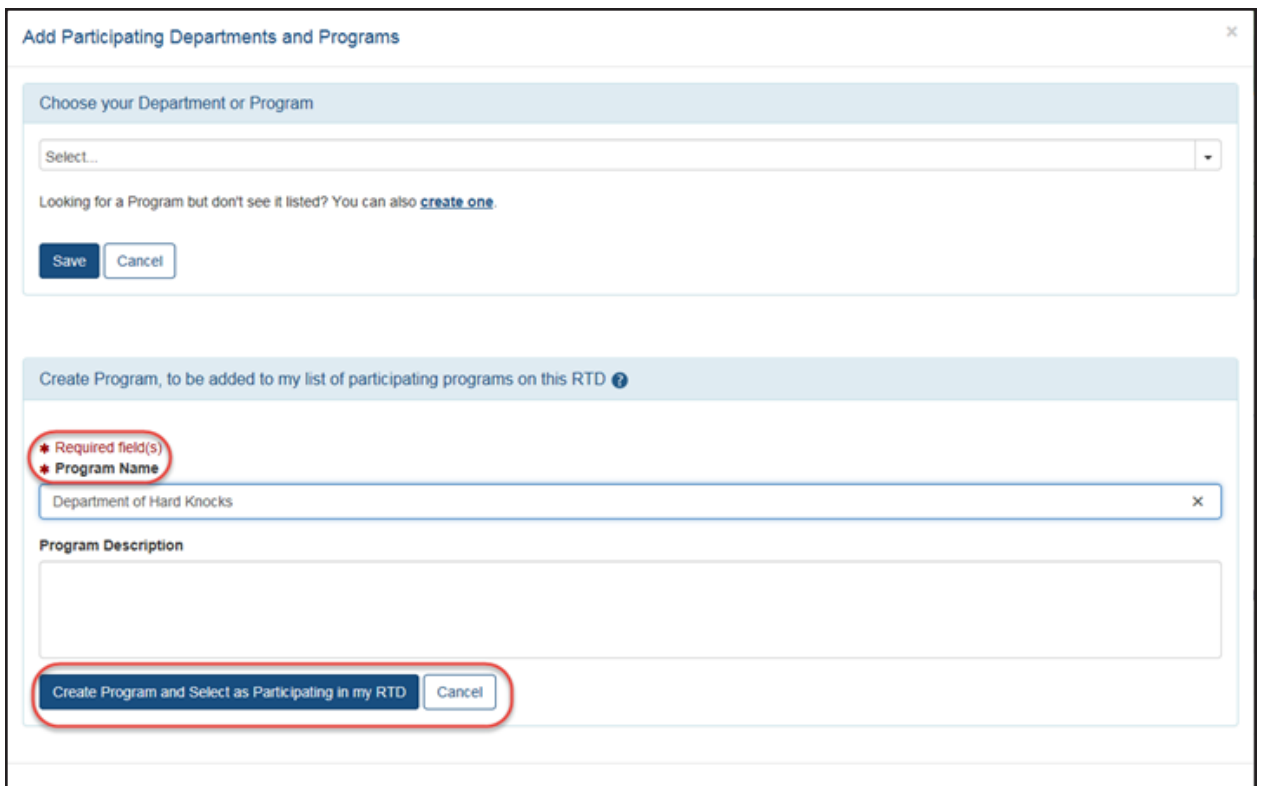
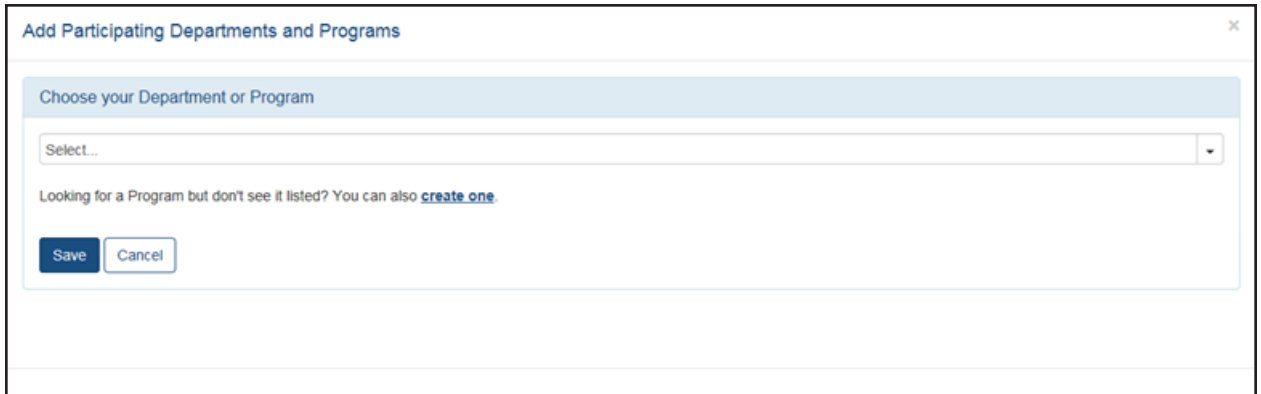
Showing 0 to 0 of 0 entries

Department or Program Name	Type	Actions
No data available in table		

2. Start typing in the text box. The system will display a list of programs with that character string in a drop-down menu.
3. Find the appropriate program in the results list drop-down and select the appropriate program.

The **Action** column updates to show *Added* for the added program. You can repeat the step to **Add Program** for as many programs as necessary.

To add a Program not available in the search results, select **Create One**. Add **Program Name** (required) and **Program Description** (optional) and select **Create Program and Select as Participating in my RTD**.

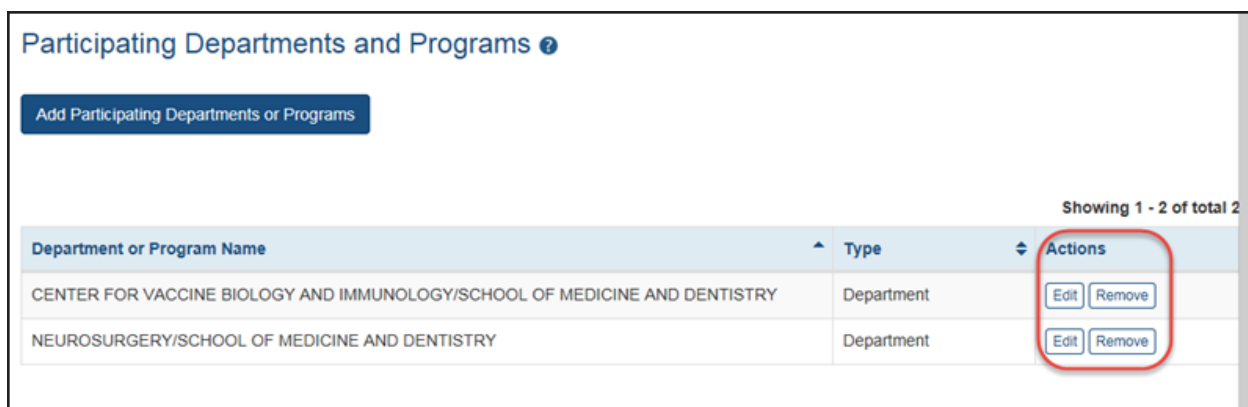


4. Click the **Save** or the **Create Program and Select as Participating in my RTD** button to add the program and close the screen.
  - a. After clicking the **Create Program and Select as Participating in my RTD** button, click the subsequent **Save** button.

The *Participating Departments and Programs* screen updates to show the added program(s) in a table. Added programs and departments display in the same table. The **Actions** column includes links for removing and editing the programs and departments.

### 8.1.3 Edit Departments & Programs

To edit a program or department, select the **Edit** button from the **Actions** column.



Participating Departments and Programs ⓘ

Add Participating Departments or Programs

Showing 1 - 2 of total 2

Department or Program Name	Type	Actions
CENTER FOR VACCINE BIOLOGY AND IMMUNOLOGY/SCHOOL OF MEDICINE AND DENTISTRY	Department	<a href="#">Edit</a> <a href="#">Remove</a>
NEUROSURGERY/SCHOOL OF MEDICINE AND DENTISTRY	Department	<a href="#">Edit</a> <a href="#">Remove</a>

Update the Census information as necessary.

#### Faculty

- Total
- Participating

#### Predotorates

- Total
- Supported by any HHS Training Award
- Students with Participating Faculty
- Eligible Students with Participating Faculty
- TGE Predocs Supported by this Training Grant
- Predocs Supported by this Training Grant (R90 Only)

#### Postdoctorates

- Total
- Supported by any HHS Training Award
- Postdocs with Participating Faculty
- Eligible Postdocs with Participating Faculty
- TGE Postdocs Supported by this Training Grant
- Postdocs Supported by this Training Grant (R90 Only)

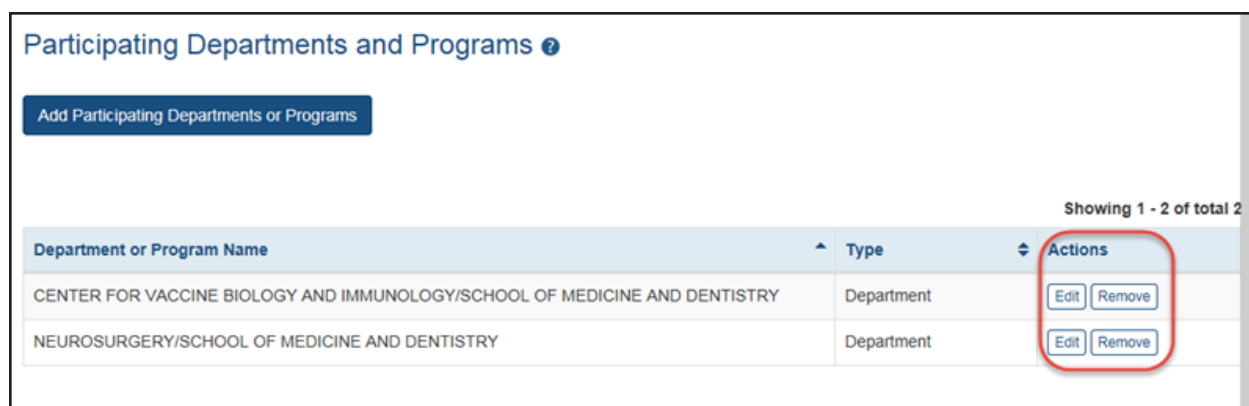
Prepare Research Training Dataset (RTD) for Revision	
RTD	4K01MH99999-05 Developing the Autism Model of Implementation for ASD Community Providers
PD/PI	Smoe, Joe
Participating Department/Program Detail ⓘ	
BIOSCIENCE CENTER/COLLEGE OF SCIENCES	
Census	
Faculty	
Total	<input type="text" value="0"/>
Participating	<input type="text" value="0"/>
Predoctorates	
Participating	<input type="text" value="0"/>
Supported by any HHS Training Award	<input type="text" value="0"/>
Students with Participating Faculty	<input type="text" value="0"/>
Eligible Students with Participating Faculty	<input type="text" value="0"/>
TGE Predocs Supported by this Training Grant	<input type="text" value="0"/>
Postdoctorates	
Total	<input type="text" value="0"/>
Supported by any HHS Training Award	<input type="text" value="0"/>
Postdocs with Participating Faculty	<input type="text" value="0"/>
Eligible Postdocs with Participating Faculty	<input type="text" value="0"/>
TGE Postdocs Supported by this Training Grant	<input type="text" value="0"/>
<input type="button" value="Save and Close"/>	<input type="button" value="Clear"/>

Select the **Save and Close** button to save the information.

## 8.1.4 Participating Department/Program Detail (Revision)

### 8.1.4.1 Edit Departments & Programs

To edit a program or department, select the **Edit** button from the **Actions** column.



<a href="#">Add Participating Departments or Programs</a>		
Showing 1 - 2 of total 2		
Department or Program Name	Type	Actions
CENTER FOR VACCINE BIOLOGY AND IMMUNOLOGY/SCHOOL OF MEDICINE AND DENTISTRY	Department	<a href="#">Edit</a> <a href="#">Remove</a>
NEUROSURGERY/SCHOOL OF MEDICINE AND DENTISTRY	Department	<a href="#">Edit</a> <a href="#">Remove</a>

Update the Census information as necessary.

#### Faculty

- Total
- Participating

#### Predotorates

- Total
- Supported by any HHS Training Award
- Students with Participating Faculty
- Eligible Students with Participating Faculty
- TGE Predocs Supported by this Training Grant
- Predocs Supported by this Training Grant (R90 Only)

#### Postdoctorates

- Total
- Supported by any HHS Training Award
- Postdocs with Participating Faculty
- Eligible Postdocs with Participating Faculty

- TGE Postdocs Supported by this Training Grant
- Postdocs Supported by this Training Grant (R90 Only)



Prepare Research Training Dataset (RTD) for Revision	
RTD	4K01MH99999-05 Developing the Autism Model of Implementation for ASD Community Providers
PD/PI	Smoe, Joe
Participating Department/Program Detail ⓘ	
BIOSCIENCE CENTER/COLLEGE OF SCIENCES	
Census	
Faculty	
Total	<input type="text" value="0"/>
Participating	<input type="text" value="0"/>
Predoctorates	
Participating	<input type="text" value="0"/>
Supported by any HHS Training Award	<input type="text" value="0"/>
Students with Participating Faculty	<input type="text" value="0"/>
Eligible Students with Participating Faculty	<input type="text" value="0"/>
TGE Predocs Supported by this Training Grant	<input type="text" value="0"/>
Postdoctorates	
Total	<input type="text" value="0"/>
Supported by any HHS Training Award	<input type="text" value="0"/>
Postdocs with Participating Faculty	<input type="text" value="0"/>
Eligible Postdocs with Participating Faculty	<input type="text" value="0"/>
TGE Postdocs Supported by this Training Grant	<input type="text" value="0"/>
<input type="button" value="Save and Close"/>	<input type="button" value="Clear"/>

Select the **Save and Close** button to save the information.

## 8.2 Training Support & Summary (Revision)

### 8.2.0.1 Summary Statistics

Displays the read-only totals of the following:

- Average Grant Support per Participating Faculty Member
- Total Number of Predoc Positions
- Total Number of Postdoc Positions
- Total Number of Short-Term Positions

The **Average Grant Support per Participating Faculty Member** is the mean of the Current Year Direct Costs in Research Support for each Faculty member.

The total number of positions represent the sums of the positions entered for each Institution Training Grant.

Prepare Research Training Dataset (RTD) for Revision

RTD

5T32DA999999-20 Substance Abuse Interdisciplinary Training Program

PD/PI

Case, Sue

Training Support & Summary

Summary Statistics

Institutional Training Support Detail

NIH Sources of Support

Showing 1 - 1 of total 1

Grant Title	Award Number	Project Period	PD/PI	Action
Modeling HIV-1 induced disruption of blood brain barrier integrity	F31NS999999-03	12/2013 to 11/2016	Light, Bud	<div>Edit</div> <div>Remove</div>

Add Institutional Training Support

Census Totals

### 8.2.1 Institutional Training Support

To add currently active, federal institutional training, career development, or research education support available to the participating faculty members:

1. Select the **Add Institutional Training Support** button in the **Institutional Training Support Detail** section.

**Training Support & Summary** ?

+ Summary Statistics

- Institutional Training Support Detail

NIH Sources of Support

Showing 1 - 1 of total 1

Grant Title	Award Number	Project Period	PD/PI	Action
Integrative Immunology Training Program	T32AI999999-37	07/1980 to 05/2019		<a href="#">Edit</a> <a href="#">Remove</a>

**Add Institutional Training Support**

+ Census Totals

2. Search for support by entering any of the criteria on the *Add Institutional Training Support* pop-up. You must enter either an IC Code or PD/PI Last Name.
  - Activity Code
  - IC Code
  - Serial Number
  - Suffix Code
  - Start Date
  - End Date
  - PD/PI Last Name
  - Institution

---

**Tip:** As you type an institution name, a drop-down list of potential matches will begin to populate. Select the institution from that list.

---

3. Select the **Search Funding Sources** button.

- From the result list, click the **Select** link from the **Action** column for the correct project.

The added source of support will display on the *Training Support and Summary* screen.

Use the **Edit** and **Remove** links next to the record to update or remove the funding source as necessary.

Additional detail can be found in the [Institutional Training Support Detail](#) section.

## 8.2.2 Census Totals

Displays totals for Faculty, Predoctorates, and Postdoctorates.

### Faculty

- Total
- Participating

Use the **Edit** button to add to or update the numbers for unique faculty members across participating departments and interdepartmental programs.

### Predoc

The following read-only information is displayed. This data is maintained on the **Participating Departments/Programs** section, and the sum totals across **Participating Programs and Departments** are shown here.

- Total
- Supported by any HHS Training Award

- Total Predoctorates with Participating Faculty
- Eligible Students with Participating Faculty
- TGE Predocs Supported by this Training Grant
- Predocs Supported by this Training Grant (R90 Only)

### **Postdoc**

The following read-only information is displayed. This data is maintained on the **Participating Departments/Programs** section, and the sum totals across **Participating Programs and Departments** are shown here.

- Total
- Supported by any HHS Training Award
- Total Postdoctorates with Participating Faculty
- Eligible Postdocs with Participating Faculty
- TGE Postdocs Supported by this Training Grant
- Postdocs Supported by this Training Grant (R90 Only)

### **8.2.3 Institutional Training Support Detail (Revision)**

Select the **Edit** link on the **Institutional Training Support** section of the *Training Support & Summary* to open the *Editing* screen.

Prepare Research Training Dataset (RTD) for Revision

RTD

1K99MH999999-01 FOXP2-Regulated Signaling Pathways Critical for Higher Cognitive Functions

PD/PI

Einstein, Albert

Institutional Training Support Detail ?

Project Title:

Hippocampus, Posterior Cingulate Cortex and Contextual Learning and Memory

Grant Number:

R01MH999999-01A2

+ Number of Trainee Positions

+ Overlapping Faculty

Number of Overlapping Faculty

0

Showing 0 to 0 of 0 entries

Overlapping Faculty Name

▲

Action

No data available in table

Add Overlapping Faculty

### 8.2.3.1 Number of Trainee Positions

Use this section to add the number of Predoc, Postdoc, Short-term, and Participating Faculty positions.

1. Select the **Edit** button.
2. In the *Institutional Training Support* pop up, enter the appropriate totals.
3. Click the **Save** button.

### 8.2.3.2 Overlapping Faculty

Use this section to update the number of overlapping faculty.

1. Select the **Add Overlapping Faculty** button.

Prepare Research Training Dataset (RTD) for Revision

RTD

1K99MH999999-01 FOXP2-Regulated Signaling Pathways Critical for Higher Cognitive Functions

PD/PI

Einstein, Albert

Institutional Training Support Detail ?

Project Title:

Hippocampus, Posterior Cingulate Cortex and Contextual Learning and Memory

Grant Number:

R01MH999999-01A2

+ Number of Trainee Positions

+ Overlapping Faculty

Number of Overlapping Faculty

0

Showing 0 to 0 of 0 entries

Overlapping Faculty Name

Action

No data available in table

Add Overlapping Faculty

2. In the **Action** column, select **Add Overlapping Faculty** for any participating faculty members that are also on the Institution Training Grant. If a needed faculty member does not display in the results, then add the faculty member as Participating Faculty as described in the topic titled *Participating Faculty Members (Revision)* on Page 142 for revision applications.

The **Action** column updates with the word *Added*.

Add Overlapping Faculty

Person Name	Commons User ID	Person ID	Email	Action
White, Snow	WHITES	1234567	eRATest@mail.nih.gov	Add Overlapping Faculty
Black, Jack	BLACKJ	2345678	eRATest@mail.nih.gov	Add Overlapping Faculty
Smith, Black	SMITHB	3456789	eRATest@mail.nih.gov	Add Overlapping Faculty
Smith, Blue	SMITHBL	4567890	eRATest@mail.nih.gov	Add Overlapping Faculty
Light, Bud	LIGHTB	5678901	eRATest@mail.nih.gov	Add Overlapping Faculty
Crosby, Bing	CROSBYB	6789012	eRATest@mail.nih.gov	Add Overlapping Faculty
Thomas, Danny	THOMASD	7890123	eRATest@mail.nih.gov	Add Overlapping Faculty
Thomas, Marlo	THOMASM	8901234	eRATest@mail.nih.gov	✓Added

Close

3. Select the **Close** button.

The Overlapping Faculty Name displays on the *Institutional Training Support Detail* screen with the option to **Remove** the overlapping faculty member. The updated total count of the overlapping faculty is calculated by system and is displayed as read-only.

### 8.3 Participating Faculty Members (Revision)

Displays the participating faculty added to the RTD - or a message indicating that no faculty have been added, when appropriate.

#### 8.3.1 Add Faculty

To add faculty, select the **Add Faculty Member** button.

**NOTE:** Up to two faculty members may be associated with a student. If there already two faculty members already listed, then the **Add Faculty Member** button does not display. To change a faculty member, delete the appropriate one first and then add the new one.

1. Use the parameters on the *Search for Person(s)* window to find the faculty member. To look outside your institution, uncheck the box titled **Search for persons who have a Commons affiliation with my institution**.



**NOTE:** You must enter a Commons ID, Person ID, or Last Name to perform a search.

2. Select the **Search Persons** button.

**Search for Faculty**

**Search Criteria**

\* Either Commons User ID or Person ID or Last Name is required to perform person search.

\* Commons User ID

\* Person ID

First Name

Middle Name

\* Last Name

Shorts%

☒ Search for persons who have a Commons affiliation with my institution

You can perform a wildcard search on Commons ID or Last Name, by using the "%" character.  
For example: abcd% or %abcd% or ab%cd%.

Search Persons Clear

Close

3. All matching records display in the **Person(s)** table. Select the **Add Faculty** button to add the person to the RTD.

When the **Add Faculty** button is clicked, the **Action** column will display the word *Added*.

Search for Faculty

Search Criteria

Search Results

Persons

Filter:

Showing 1 - 2 of total 2

Show

10

per page

< 1 >

Person Name	Commons User ID	Person ID	Commons Institution	Email	Action
Shorts, Bill	SHORTSB	1234567	UNIVERSITY OF ROCHESTER	eRATest@mail.nih.gov	Added
Shorts, Jim	SHORTSJ	7654321	UNIVERSITY OF ROCHESTER	eRATest@mail.nih.gov	Add Faculty

Looking for a Person but don't see that person listed? You can create a new xTRACT person record here.

Close

4. Search for and add other faculty as necessary, repeating the steps above.
  - a. Once two faculty members are added, the ability to add more is disabled.
5. Use the **Close** button to close the search screen when finished.

### 8.3.2 Edit Faculty

Use the **Edit** link in the **Actions** column to edit the participating faculty detail for the selected member. Refer to the topic titled *Participating Faculty Detail (Revision)* on Page 144.

### 8.3.3 Remove

Select the **Remove** link in the **Actions** column to remove the faculty member from the RTD. At the confirmation, select **Yes**.

### 8.3.4 Participating Faculty Detail (Revision)

Use the + plus icon next to each individual sections of the *Participating Faculty Detail*. The **Open All Sections** link reveals all collapsed sections at once.

Prepare Research Training Dataset (RTD) for Revision

RTD

1K99MH999999-01 FOXP2-Regulated Signaling Pathways Critical for Higher Cognitive Functions

PD/PI

Lennon, John

Participating Faculty Detail ?

McCartney, Paul

+ Open All Sections

Faculty Member Data

Commons User ID:

MCCARTNEYP

Email:

eRAStage@mail.nih.gov

Rank:

Primary Department or Program:

Research Interest:

Training Role(s):

Edit

+ Faculty Degree

+ Research Support

+ Mentoring Record

Each section provides a means for editing the information. Refer to the steps below.

#### 8.3.4.1 Faculty Member Data

Use the + plus icon in the **Faculty Member Data** panel of the *Participating Faculty Detail* to display faculty data as described below.

- **Commons User ID** (read only)
- **Person ID** (read only)
- **Email** (read only)
- **Rank**
- **Primary Department or Program**

- **Research Interest**
- **Training Role(s)**

Use the **Edit** button to open the fields in a pop-up for editing. Select **Save** to save your changes.

#### **8.3.4.2 Faculty Degree**

From this panel, you may add a degree, edit a degree, or select a degree to add to an RTD.

The **Source** of degrees is displayed as read-only as *xTRACT* (meaning that the degree was added to the person in xTRACT) or as *Commons Profile* (meaning that the degree is from the Commons Personal Profile of the person).

##### **Add a Degree**

1. Select the **Add Degree** button.
2. Update the fields in the *Add a Degree* pop-up:
  - **Degree:** Select from the list
  - **Other Degree Text:** Enter if the Degree selected is *OTH* (*other type of degree*) or an other category like *BOTH*, *DDOT*, *DOTH*, *MDOT*, *MOTH*, and *VDOT*.
  - **Degree Date:** Enter in MM/YYYY format
  - **Terminal Degree:** Select the **Yes** or **No** radio button as appropriate. When the **Yes** button is selected, the terminal degree indicator (*This is the terminal degree of this person.*) displays next to the degree details in the view. Only one degree for a person can be set as the Terminal Degree.
  - **Degree Status:** Completed or In Process are the selections available for Faculty degrees.
  - **Include in RTD:** Yes or No are the options available.
  - **Degree Institution:** Enter the institution name, one institution per degree. Start typing in some of the institution's name and a drop-down menu displays with related institution names.
3. Select the **Save** button to save your changes.
4. Repeat for any additional degrees.

##### **Edit a Degree**

1. Use the **Edit** button next to a listed degree to display the *Edit a Degree* pop-up for editing.
2. Update the fields as necessary.
3. Select the **Save** button or click the **Cancel** button.

#### **Include in RTD**

1. Locate the degree you are including in the RTD.
2. Check the **Include in RTD** box for the degree to be displayed in the **Participating Faculty Members Training Table** on the RTD PDF. Up to three degrees can be selected to include in the RTD.

Uncheck the box to exclude the degree.

#### **Delete a Degree**

Select the **Delete** button to delete the degree from the participating faculty detail. Delete degree is not available if the **Source** of the degree is *Commons Profile*, meaning the degree is from the Commons Personal Profile of the person.

### **8.3.4.3 Research Support**

#### **NIH Sources of Support**

Includes the NIH Grant number, Role on Project or Subproject, Project Title, Project Period, and Current Year Direct Costs. This information is displayed as read-only.

#### **Other Sources of Support**

Includes Funding Source, Support Type, Project Number, Project Role, Project Title, Project Period, and Current Year Direct Costs.

To add additional support:

1. Select the **Add Another Source of Support** button to display fields for searching/editing to add a non-NIH funding source.
2. Search for a funding source:
  - a. Search for support entering the parameters given and selecting **Search Funding Sources** button.
  - b. From the result list, click the **Select** link from the **Action** column for the correct project.
3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
4. Enter current year direct costs.
5. Select **Save**.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary.

### 8.3.4.4 Mentoring Record

Use the + plus icon in the **Mentoring Record** panel of the *Participating Faculty Detail* to display counts of trainees mentored.

- Predocs In Training
- Predocs Graduated
- Predocs Continued in Research or Related Careers
- Postdocs in Training
- Postdocs Completed Training
- Postdocs Continued in Research or Related Careers

Use the **Edit** button to open the fields in a pop-up for editing. Save your changes by selecting the **Save** button on the pop-up.

## 8.4 Students (Revision)

This section displays the students added to the RTD - or a message indicating that none has been added, when appropriate. From this screen, you can add, edit, and remove students.

Prepare Research Training Dataset (RTD) for Revision				
RTD	1K99MH999999-01 FOXP2-Regulated Signaling Pathways Critical for Higher Cognitive Functions			
PD/PI	Lennon, John			
Students ?				
<button>Add Student</button>				
Showing 1 - 1 of total 1				
Person Name	Commons User ID	Person ID	Student Type	Action
Starr, Ringo	STARR	1234567	Pre-doc	<button>Edit</button> <button>Remove</button>

Students(s) are listed in a table at the bottom of the screen along with the following information:

- **Student Name**
- **Commons User ID** (if available)
- **Person ID**

- **Student Type:** Pre-doc or Post-doc
- **Actions**
  - The **Edit** link opens the *Student Detail* for the selected trainee. Refer to the topic titled *Student Detail (Revision) on Page 151*.
  - The **Remove** link removes the person from the RTD.

The **Add Student** feature allows you to search for and add students or create new xTRACT persons to add to the RTD.

### 8.4.1 Add Student

To add a student:

1. Select the **Add Student** button.
2. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled **Search for persons who have a Commons affiliation with my institution**.

---

**NOTE:** You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

---

3. All matching records display in the **Person(s)** table. Select the **Add Student as** link in the **Action** column to add the person.

---

**NOTE:** After you perform a search, the **Create a new xTRACT Person here** link is enabled. Use this link to create an xTRACT person record. Refer to the topic titled *Create xTRACT Person on Page 184*

---

4. Select the **Student Type** from the pop-up box.
5. Repeat to add other students. Added students appear in the **Person(s)** list with the word *Added* shown in the **Action** column.
6. Use the **Close** button to close the search screen.

Search for Students

Search Criteria

★ Either Commons User ID or Person ID or Last Name is required to perform person search.

★ Commons User ID

★ Person ID

First Name

Middle Name

★ Last Name

Search for persons who have a Commons affiliation with my institution

You can perform a wildcard search on Commons ID or Last Name, by using the "%" character.  
For example: abcd% or %abcd% or ab%cd%.

Search Persons

Clear

Close

Search for Students

Search Criteria

Search Results

Persons

Filter:

Showing 1 - 2 of total 2

Show 10 per page 1

Person Name	Commons User ID	Person ID	Commons Institution	Email	Action
Bond, James	BONDJ	1234567	UNIVERSITY OF ROCHESTER	eRATest@mail.nih.gov	Add Student as
Bond, Secure	BONDS	7654321	UNIVERSITY OF ROCHESTER	eRATest@mail.nih.gov	Added

Looking for a Person but don't see that person listed? You can [create a new xTRACT person record here.](#)

Close

## 8.4.2 Edit Student

From the list of students, select the **Edit** link in the **Actions** column to edit the student detail.

Refer to the topic titled *Student Detail (Revision)* on Page 151.



### 8.4.3 Remove

Select the **Remove** link in the **Actions** column to remove the student from the RTD. At the confirmation, select **Yes**.

### 8.4.4 Student Detail (Revision)

Use the + plus sign icon to display individual sections of the *Student Detail*. The **Open All Sections** link reveals all collapsed sections at once.

Prepare Research Training Dataset (RTD) for Revision

RTD	1K99MH999999-01 FOXP2-Regulated Signaling Pathways Critical for Higher Cognitive Functions
PD/PI	Lennon, John

Participating Faculty Detail ?  
McCartney, Paul

[+ Open All Sections](#)

Faculty Member Data

Commons User ID: MCCARTNEYP

Email: eRAStage@mail.nih.gov

Rank:

Primary Department or Program:

Research Interest:

Training Role(s):

[Edit](#)

[+ Faculty Degree](#)

[+ Research Support](#)

[+ Mentoring Record](#)

Each section provides a means for viewing or editing the information. Refer to the steps below.

#### 8.4.4.1 Student Data

Use the + plus sign icon in the **Student Data** panel of the *Student Detail* to display the following read-only information:

- Commons User ID or Person ID
- Email

#### 8.4.4.2 In Training Data

Use the + plus sign icon in the **In Training Data** panel of the *Student Detail* to display in training data as described below. Use the **Edit** button to open the fields in a pop-up for editing.

- In Training
- Type
- Research Topic
- Start Date
  - Into Current Degree-Granting Program, for a Predoctoral trainee
  - Into Postdoctoral Research, for Postdoctoral trainee
- End Date (when Trainee Left Program)

#### 8.4.4.3 Faculty Members

Displays the faculty members for the student on the RTD.

To add faculty, select the **Add Faculty Member** button.

---

**NOTE:** Up to two faculty members may be associated with a student. If there already two faculty members already listed, then the **Add Faculty Member** button does not display. To change a faculty member, delete the appropriate one first and then add the new one.

---

1. Use the parameters on the *Search for Person(s)* window to find the faculty member. To look outside your institution, uncheck the box titled **Search for persons who have a Commons affiliation with my institution**.

---

**NOTE:** You must enter a Commons ID, Person ID, or Last Name to perform a search.

---

2. Select the **Search Persons** button.

Search for Faculty

Search Criteria

★ Either Commons User ID or Person ID or Last Name is required to perform person search.

★ Commons User ID

★ Person ID

First Name

Middle Name

★ Last Name

Shorts%

☒ Search for persons who have a Commons affiliation with my institution

You can perform a wildcard search on Commons ID or Last Name, by using the "%" character.  
For example: abcd% or %abcd% or ab%cd%.

- All matching records display in the **Person(s)** table. Select the **Add Faculty** button to add the person to the RTD.

When the **Add Faculty** button is clicked, the **Action** column will display the word *Added*.

Search for Faculty

Search Criteria

Search Results

Persons

Showing 1 - 2 of total 2

Filter:

Show 10 per page
1

Person Name	Commons User ID	Person ID	Commons Institution	Email	Action
Shorts, Bill	SHORTSB	1234567	UNIVERSITY OF ROCHESTER	eRATest@mail.nih.gov	✓Added
Shorts, Jim	SHORTSJ	7654321	UNIVERSITY OF ROCHESTER	eRATest@mail.nih.gov	<input type="button" value="Add Faculty"/>

Looking for a Person but don't see that person listed? You can [create a new xTRACT person record here](#).

4. Search for and add other faculty as necessary, repeating the steps above.
  - a. Once two faculty members are added, the ability to add more is disabled.
5. Use the **Close** button to close the search screen when finished.

To remove a faculty member from the Student, select the **Delete** link from the **Action** column.

#### **8.4.4.4 Degrees**

xTRACT displays a list of completed degrees and associated data.

The **Source** of degrees is displayed as read-only as *xTRACT* (meaning that the degree was added or edited to the person in xTRACT) or as *Commons Profile* (meaning that the degree is from the Commons Personal Profile of the person).

To add a degree:

1. Select the **Add Degree** button.
2. Update the fields in the *Create a New Degree* pop-up:
  - **Degree**: Select from the list
  - **Other Degree Text**: Enter if Degree selected is *OTH* (*other type of degree*) or an other category like BOTH, DDOT, DOTH, MDOT, MOTH, and VDOT.
  - **Degree Date**: Enter in MM/YYYY format
  - **Terminal Degree**: Select the **Yes** or **No** . When **Yes** is selected, the terminal degree indicator (*This is the terminal degree of this person.*) displays next to the degree details in the view. Only one degree per person can be set as the Terminal Degree.
  - **Degree Status**: Select Completed or In Progress, as appropriate
  - **Received in Training**: Select Yes or No. Up to three degrees can be selected as Received in Training.
  - **Degree Institution**: Enter the institution name, one institution per degree. Start typing in some of the institution's name and a drop-down menu displays with related institution names.
3. Select the **Save** button to save the new degree.
4. Repeat for any additional degrees.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the degrees as necessary. Degrees with *Commons Profile* as a **Source** cannot be deleted.

#### **8.4.4.5 Post-Training Positions**

Displays post-training positions employment information. The **Source** of positions is displayed as read-only as *xTRACT* (meaning the position was added or updated for the person in xTRACT) or as *Commons Profile* (meaning the position is from the Commons Personal Profile of the person).

To add employment:

1. Select the **Add Employment** button.
2. Provide the following information:
  - **Faculty Teaching Position:** Select from the list
    - Professor; Associate Professor; Assistant Professor; Instructor; Other
  - **Academic Administrative Position:** Select from the list
    - President; Vice President; Dean; Assistant or Associate Dean; Chairperson of Department (or Director); Other
  - **Primary Employment Indicator:** Select the **Yes**, **No**, as appropriate.
  - **Full Time Employment Indicator:** Select **Full-Time** or **Part Time**
  - **Current/Initial Employment Indicator:** Select **Primary Current** or **Primary Initial** or both, as appropriate
  - **Primary Activity:** Select from list
    - Research-intensive; Research-related; Further training; Other
  - **Employment Position:** Enter the position title for the employment. This is required.
  - **Institution:** Use the type a head feature to find the appropriate institution.
  - **Primary Department of Position:** Use the type a head feature to find the appropriate department.
  - **Start Date:** Select a date in MM/YYYY format. This is required.
  - **End Date:** Select a date MM/YYYY format.
3. Select the **Save** button to save the changes.
4. Repeat to add another.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the positions as necessary. Positions with a **Source** of *Commons Profile* cannot be deleted.

#### **8.4.4.6 Subsequent Grants**

##### **NIH or Other Agency Sources of Support**

Includes the NIH or Other Agency Grant number, Project Title, Award Start Date, Period of Support.

To add additional NIH or Other Agency support:

1. Select the **Add NIH Source of Support** button to open the *Add NIH Source of Support* pop-up.

2. Enter **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of this person's involvement.
3. Select **Save**.

Use the **Edit** and **Delete** links to update or remove the funding source as necessary.

### Other Sources of Support

Includes Funding Source, Support Type, Project Number, Project Role, and Award Start Date.

To add additional support:

1. Select the **Add Other Source of Support** button to open the *Add Non-NIH Source of Support* pop-up.

Search for support or create new funding source:

To search:

- a. Search for support entering the parameters given and selecting **Search Funding Sources** button.
- b. From the result list, click the **Select** link from the **Action** column for the correct project.

To create:

- a. Select the **Create Funding Source** button.
  - b. Update the fields. Required fields show a red asterisk (\*).
  - c. Select **Save**.
2. Select an option from the **Role during funding** drop-down.
  3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
  4. Select **Save**.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary.

#### 8.4.4.7 Publications

To add a publication:

1. Select the **Add Publication** button.
2. From the *Add Publication* pop-up, enter one or more of the **required** information: **Commons User ID**, **Person ID**, or **Last Name**

- a. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled **Search for persons who have a Commons affiliation with my institution**.
  - b. All matching records display in the **Person(s)** table. Click the **Add Faculty** button to add the person. This will populate the name into the *Add Publication* pop-up, which will display on your screen once again.
3. Search for a publication by one of the following:
  - a. **PMID/PMCID**
  - b. **First Name, Last Name, or Title**
  - c. Click the **Search** button.
  - d. Click the **Add** button to add the appropriate publication.
  - e. Next select the appropriate **Authors** check boxes.
4. To edit a publication click the **Manual Edit Publication** button.
  - a. Enter the required fields: **Title, Journal, or Authors**.
  - b. Click the **Continue to review & confirm** button.
5. Finally click the **Save** button to save the information. You will see a confirmation at the top of the pop-up.

To indicate no publications, mark the check box titled **Check this box if there are no publications for this trainee**.

After checking the no publications check box, you will be guided through the following steps:

1. Select a reason for **No Publications** from the drop-down list.
2. Search for and select a faculty member.
3. Select the **Save** button to save the information.

Use the **Edit** and **Delete** buttons next to a specific publication to update or remove that record.

## **8.5 Participating Trainees (Revision)**

Displays the participating trainees added to the RTD - or a message indicating that none has been added, when appropriate. From this screen, you can add, edit, and remove participating trainees.

Prepare Research Training Dataset (RTD) for Revision

RTD

1K99MH999999-01 FOXP2-Regulated Signaling Pathways Critical for Higher Cognitive Functions

PD/PI

Lennon, John

Participating Trainees ?

Add Trainee

Showing 1 - 1 of total 1

Person Name	Commons User ID	Person ID	Trainee Type	Start Date	End Date	Action
Rogers, Kenny	ROGERSK	7654321	Pre-doc			<a>Edit</a> <a>Remove</a>

Participating trainee(s) are listed in a table at the bottom of the screen along with the following information:

- **Person Name**
- **Commons User ID** (if available)
- **Person ID**
- **Trainee Type**: Pre-doc; Post-doc; Short Term
- **Start Date**
- **End Date**
- **Actions**
  - The **Edit** link opens the *Participating Trainee Detail* for the selected trainee. Refer to the topic titled *Participating Trainee Detail (Revision)* on Page 159.
  - The **Remove** link removes the person from the RTD.

The **Add Trainee** feature allows you to search for and add existing trainees or create new xTRACT persons to add to the RTD.

### 8.5.1 Add Trainee

To add a trainee:

1. Select the **Add Trainee** button.
2. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your



institution by removing the checkmark from the box titled **Search for persons who have a Commons affiliation with my institution**.

---

**NOTE:** You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

---

3. All matching records display in the **Person(s)** table. Select the **Add Trainee** link in the **Action** to add the person.

---

**NOTE:** After you perform a search, the **Create xTRACT Person** button is enabled. Use this button to create an xTRACT Person record. Refer to the topic titled [Create xTRACT Person on Page 184](#)

---

4. Select the **Trainee Type** from the pop-up box: Pre Doctoral, Post Doctoral, or Short Term and click **OK**.
5. Repeat for any to add other students. Added students appear in the **Person(s)** list with the word *Added* shown in the **Action** column.
6. Use the **Close** button to close the search screen.

### 8.5.2 Edit Trainee

From the list of trainees, select the **Edit** link in the **Actions** column to edit the trainee detail for the selected trainee.

Refer to the topic titled [Participating Trainee Detail \(Revision\) on Page 159](#).

### 8.5.3 Remove

Select the **Remove** link in the **Actions** column to remove the trainee from the RTD. At the confirmation, select **Yes**.

### 8.5.4 Participating Trainee Detail (Revision)

While preparing an RTD for a Renewal, you can open the *Participating Trainee Detail* for a trainee by selecting that trainee's **Edit** link. The *Participating Trainee Data* for the selected person is grouped into panels. Use the +plus sign icon, **Edit** buttons, and links to display and edit the information as detailed below.

Prepare Research Training Dataset (RTD) for Revision	
<b>RTD</b>	1K99MH999999-01 FOXP2-Regulated Signaling Pathways Critical for Higher Cognitive Functions
<b>PD/PI</b>	Lennon, John
<b>Participating Trainee Detail</b>	
Parton, Dolly (Pre-doc)	
<a href="#">[+ Open All Sections]</a>	
<b>– Trainee Data</b>	
<b>Commons User ID:</b>	PARTOND
<b>Email:</b>	eRAStage@mail.nih.gov
<b>+ In Training Data</b>	
<b>+ Faculty Members</b>	
<b>+ Support During Training</b>	
<b>+ Degrees</b>	
<b>+ Post-Training Positions</b>	
<b>+ Subsequent Grants</b>	
<b>+ Publications</b>	

**IMPORTANT:** The information displayed in the trainee detail is comprised of information pulled from the trainee's eRA Commons Personal Profile, where available. However, updates made to the xTRACT trainee detail will not update that trainee's Personal Profile in Commons.

#### 8.5.4.1 Trainee Data

Use the **View** link in the **Trainee Data** panel of the *Participating Trainee Detail* to display the following read-only information, as applicable:

- Person ID or Commons ID
- Email

#### 8.5.4.2 In Training Data

Use the **View** link in the **In Training Data** panel of the *Participating Trainee Detail* to display in training data as described below. Use the **Edit** button to open the fields in a pop-up for editing.

- In Training
- Type
- Research Topic
- Start Date
  - Current Degree-Granting Program for a Predoctoral trainee
  - Postdoctoral Research for Postdoctoral trainee
- End Date (when Trainee Left Program)

---

**NOTE:** In order to finalize the RTD for an RPPR, all trainees must have a start date in the **In Training Data** section. Additionally, trainees with *No* selected for **In Training** status must have an end date.

---

#### **8.5.4.3 Faculty Members**

Displays the participating faculty added to the RTD.

To add faculty, select the **Add Faculty Member** button.

---

**NOTE:** Up to two faculty members may be associated with a student. If there already two faculty members already listed, then the **Add Faculty Member** button does not display. To change a faculty member, delete the appropriate one first and then add the new one.

---

1. Use the parameters on the *Search for Person(s)* window to find the faculty member. To look outside your institution, uncheck the box titled **Search for persons who have a Commons affiliation with my institution.**

---

**NOTE:** You must enter a Commons ID, Person ID, or Last Name to perform a search.

---

2. Select the **Search Persons** button.

Search for Faculty

Search Criteria

★ Either Commons User ID or Person ID or Last Name is required to perform person search.

★ Commons User ID

★ Person ID

First Name

Middle Name

★ Last Name

Shorts%

☒ Search for persons who have a Commons affiliation with my institution

You can perform a wildcard search on Commons ID or Last Name, by using the "%" character.  
For example: abcd% or %abcd% or ab%cd%.

Search Persons Clear

Close

- All matching records display in the **Person(s)** table. Select the **Add Faculty** button to add the person to the RTD.

When the **Add Faculty** button is clicked, the **Action** column will display the word *Added*.

Search for Faculty

Search Criteria

Search Results

Persons

Showing 1 - 2 of total 2

Filter:

Show 10 per page < 1 >

Person Name	Commons User ID	Person ID	Commons Institution	Email	Action
Shorts, Bill	SHORTSB	1234567	UNIVERSITY OF ROCHESTER	eRATest@mail.nih.gov	✓Added
Shorts, Jim	SHORTSJ	7654321	UNIVERSITY OF ROCHESTER	eRATest@mail.nih.gov	Add Faculty

Looking for a Person but don't see that person listed? You can [create a new xTRACT person record here.](#)

Close

4. Search for and add other faculty as necessary, repeating the steps above.
  - a. Once two faculty members are added, the ability to add more is disabled.
5. Use the **Close** button to close the search screen when finished.

To remove a faculty member from the RTD, select the **Delete** link in the **Action** column.

#### **8.5.4.4 Support During Training**

---

**NOTE:** This section applies to pre-doc and and post-doc trainees only.

---

Sources of support, both within and outside of NIH, can be maintained in this section. Click on the collapsed panel to display the information.

After a start date has been added for the trainee in *In Training Data*, the **Training Years (TYs)** will be displayed as read-only with corresponding abbreviations for funding sources in **Support During Training**.

##### **This NIH Training Grant**

Includes the NIH Grant number , Project Title, Period of Support.

Click the **Add This NIH Source of Support** to add support from **This NIH Training Grant**. Enter the **Start of Funding** and **End of Funding**. To remove support from **This NIH Training Grant**, select **Delete All from This NIH Funding Source of Support**.

##### **NIH Sources of Support**

Includes the NIH Grant number, Project Title, Period of Support.

To add additional NIH or Other Agency support:

1. Select the search icon next to **Funding Source** to open query fields.
  - a. Enter search criteria in the fields.
  - b. Select the **Search Funding Sources** button.
  - c. From the list, select the funding source by clicking the appropriate **Select** link in the **Action** column.
2. Enter **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of this person's involvement.
3. Enter the **Other role description** if *Other* was selected for **Role during funding**.
4. Select **Save**.
5. Repeat the search to add more.

Use the **Edit** and **Delete** links to update or remove the funding source as necessary.

##### **Other Sources of Support**

Includes Funding Source, Support Type, Project Number, Project Role, and Award Start

Date.

To add additional support:

1. Select the **Add Other Source of Support** button to open the *Edit/Add Sources of Support* pop-up.

Search for support or create new funding source:

To search:

- a. Search for support entering the parameters given and selecting **Search Funding Sources** button.
- b. From the result list, click the link from the **Action** column for the correct project.

To create:

- a. Select the **Create Funding Source** button.
  - b. Update the fields. Required fields show a red asterisk (\*).
  - c. Select **Save**.
2. Select an option from the **Role during funding** drop-down.
  3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
  4. Enter the **Other role description** if *Other* was selected for **Role during funding**.
  5. Select **Save**.
  6. Repeat the search to add more.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary.

#### 8.5.4.5 Degrees

xTRACT displays a list of completed degrees and associated data in reverse chronological order, with incomplete degrees following.

To add a degree:

1. Select the **Add Degree** button.
2. Update the fields in the *Create a New Degree* pop-up:
  - **Degree**: Select from the list
  - **Other Degree Text**: Enter the name of the degree if an *OTH* type of degree was selected.
  - **Degree Date**: Enter in MM/YYYYY format

- **Terminal Degree:** Select the **Yes** or **No** as appropriate. When **Yes** is selected, the terminal degree indicator (*This is your terminal degree.*) displays next to the degree details in the view. A person can only have one terminal degree.
  - **Degree Status:** Select Completed or In Progress, as appropriate
  - **Received in Training:** Select Yes or No. Up to three degrees can be set as Received in Training.
  - **Degree Institution:** Enter the institution name, one institution per degree. You can search for an institution by selecting the magnifying glass search icon.
3. Select the **Save** button to save your changes.
  4. Repeat for any additional degrees.
  5. Select the **Close** button when finished.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the degree(s) as necessary. Degrees *Commons Profile* as the **Source** cannot be deleted.

#### **8.5.4.6 Post-Training Positions**

Displays post-training positions employment information.

To add employment:

1. Select the **Add Employment** button.
2. Provide the following information:
  - **Faculty Teaching Position:** Select from the list:
    - Professor; Associate Professor; Assistant Professor; Instructor; Other
  - **Academic Administrative Position:** Select from the list:
    - President; Vice President; Dean; Assistant or Associate Dean; Chairperson of Department (or Director); Other
  - **Primary Employment Indicator:** Select the **Yes** or **No**.
  - **Full Time Employment Indicator:** Select **Full-Time** or **Part-Time**
  - **Current/Initial Employment Indicator:** Select **Primary Current** or **Primary Initial**
  - **Primary Activity:** Select from list
    - Research-intensive; Research-related; Further training; Other
  - **Employment Position**
  - **Institution:** Enter the institution or select the icon to open a search box
  - **Primary Department of Position:** Enter the department or select the icon to open a search box

- **Start Date:** Select a date in MM/YYYY format.
  - **End Date:** Select a date MM/YYYY format.
3. Select the **Save** button to save your changes.
  4. Repeat to add another.
  5. Select **Close** to close the window.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the position(s) as necessary. Positions with *Commons Profile* as the **Source** cannot be deleted.

#### **8.5.4.7 Subsequent Grants**

##### **NIH and Other Agency Sources of Support**

Includes the NIH Grant number, Project Title, Period of Support.

To add additional NIH or Other Agency support:

1. Select the search icon next to **Funding Source** to open query fields.
  - a. Enter search criteria in the fields.
  - b. Select the **Search Funding Sources** button.
  - c. From the list, select the funding source by clicking the appropriate **Select** link in the **Action** column.
2. Enter **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of this person's involvement.
3. Select **Save**.
4. Repeat the search to add more.

Use the **Edit** and **Delete** links to update or remove the funding source as necessary.

##### **Other Sources of Support**

Includes Funding Source, Support Type, Project Number, Project Role, and Award Start Date.

To add additional support:

1. Select the **Add Other Source of Support** button to open the *Edit/Add Sources of Support* pop-up.

Search for support or create new funding source:



To search:

- a. Search for support entering the parameters given and selecting **Search Funding Sources** button.
- b. From the result list, click the link from the **Action** column for the correct project.

To create:

- a. Select the **Create Funding Source** button.
  - b. Update the fields. Required fields show a red asterisk (\*).
  - c. Select **Save**.
2. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
  3. Select **Save**.
  4. Repeat the search to add more.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary.

#### **8.5.4.8 Publications**

To add a publication:

1. Select the **Add Publication** button.
2. From the *Add Publication* pop-up, enter one of more of the **required** information:  
**Commons User ID, Person ID, or Last Name**
  - a. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled **Search for persons who have a Commons affiliation with my institution**.
  - b. All matching records display in the **Person(s)** table. Click the **Add Faculty** button to add the person. This will populate the name into the *Add Publication* pop-up, which will display on your screen once again.
3. Search for a publication by one of the following:
  - a. **PMID/PMCID**
  - b. **First Name, Last Name, or Title**
  - c. Click the **Search** button.
  - d. Click the **Add** button to add the appropriate publication.
  - e. Next select the appropriate **Authors** check boxes.

4. To edit a publication click the **Manual Edit Publication** button.
  - a. Enter the required fields: **Title**, **Journal**, or **Authors**.
  - b. Click the **Continue to review & confirm** button.
5. Finally click the **Save** button to save the information. You will see a confirmation at the top of the pop-up.

To indicate no publications, mark the check box titled **Check this box if there are no publications for this trainee**.

After checking the no publications check box, you will be guided through the following steps:

1. Select a reason for **No Publications** from the drop-down list.
2. Search for and select a faculty member.
3. Select the **Save** button to save the information.

Use the **Edit** and **Delete** buttons next to a specific publication to update or remove that record.

## 8.6 Program Statistics (Revision)

Prepare Research Training Dataset (RTD) for Revision

RTD 5T32DA99999-25 Pharmacology of Drug Abuse

PD/PI Crosby, Bing

Program Statistics ⓘ

Are program statistics applicable for this reporting period?

☒ Yes ☐ No

\* Percentage of Trainees Entering Graduate School 10 Years Ago Who Completed the Ph.D.

0.0 %

\* Average Time to Ph.D. for Trainees in the Last 10 Years (not including leaves of absence)

0.0 Year(s)

Save Program Statistics Clear

The **Program Statistics** section is only available for training grants that have Predoctorate Trainees.

1. Enter the program statistics as follows:
  - Percentage of Trainees Entering Graduate School 10 Years Ago Who Completed the Ph.D.

- Average Time to Ph.D. for Trainees in the Last 10 Years (not including leaves of absence)
2. Select the **Save Program Statistics** button.

Use the checkbox to indicate that **Program Statistics are not applicable for this reporting period**.

## 8.7 Applicants and Entrants (Revision)

To enter Pre-doc and Post-doc applicants and entrants, first enter the start year of the most recently completed academic year and click the **Submit** button.

Select the **Pre-Doc Applicants and Entrants** and **Post-Doc Applicants and Entrants** links to display and enter data for the specific academic year(s).

Prepare Research Training Dataset (RTD) for Revision

RTD	1K99MH999999-01 FOX P2-Regulated Signaling Pathways Critical for Higher Cognitive Functions
PD/PI	Paisley, Brad

### Applicants and Entrants ?

Start year of the most recently completed academic year:

**Submit**

*The Pre-doc and Post-doc data may be edited via the links below, once the Start of the most recently completed academic year has been provided.*

[Pre-Doc Applicants and Entrants](#)

[Post-Doc Applicants and Entrants](#)

To change the most recently-completed academic year, change the year entered and select **Submit**. When changing **Academic** years, any data entered for **Applicant and Entrant Counts and Characteristics** are retained and associated with the shifted year based on order of years (rather than previously specified year).

For example, let's say the first academic year is 2000-2001 and there are applicant/entrant data entered for that year. If the first academic year is changed to 2001-2002 by changing the most recently-completed academic year from 2001 to 2002, the same applicant/entrant data display for that first year.

## 8.7.1 Predoctoral Applicant and Entrant Counts and Characteristics (Revision)

### 8.7.1.1 Edit the Counts and Characteristics

For each Academic Year, update the *Applicant and Entrant Counts and Characteristics* appropriately. Use the **Edit** buttons provided at the bottom of each table to enter your data. These buttons open up the fields on each table. Enter the data and select the **Save** buttons to save it. Or select **Cancel** to exit editing without saving the changes.

Prepare Research Training Dataset (RTD) for Revision

RTD

1K99MH999999-01 FOXP2-Regulated Signaling Pathways Critical for Higher Cognitive Functions

PD/PI

Berry, Chuck

2015 - 2016

2014 - 2015

2013 - 2014

2012 - 2013

2011 - 2012

Summary

Predoctoral Applicant and Entrant Counts and Characteristics

+ Open All Sections

Counts: Department or Program

Department or Program	Total Applicant Pool	Applicants Eligible for Support	New Entrants to the Program	New Entrants Eligible for Support	New Entrants Appointed to this Grant
CHEMICAL & BIOMOLECULAR ENGINEERING/HENRY SAMUELI SCH OF ENGINEERING & APPLIED SCIENCE					
<b>Total</b>	0	0	0	0	0

Edit Counts

+ Characteristics: GPA

+ Characteristics: Research Experience

+ Characteristics: Prior Institutions

+ Characteristics: Diversity

### 8.7.1.2 Counts table

For Predoctoral Applicants and Entrants, Counts are entered by Participating Departments or Program. If a Department or Program is missing, refer to the topic titled *Participating Departments and Programs (Renewal)* on Page 74. The following fields are provided for data entry on each department or program:

- Department or Program (read only)
- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support

### **8.7.1.3 Characteristics**

The following tables exist for Characteristics:

#### **GPA**

Enter the Mean GPA, Lowest GPA, and Highest GPA for the following:

- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support

#### **Research Experience**

Enter the mean, lowest, and highest number of months of prior, full-time research experience for the following:

- New Entrants to the Program
- New Entrants Eligible for Support

#### **Prior Institutions**

Use the **Characteristics: Research Experience** section to search and select an institution. Start typing in the Institution field. Select the appropriate institution from the drop-down list. Once the institution is selected and displayed on the table, enter a numeric value in the **New Entrants to the Program** and/or **New Entrants Eligible for Support** fields. Select the **Add Prior Institution** link in the **Action** column.

Use the **Edit** and **Remove** links to modify or remove this data.

- New Entrants to the Program
- New Entrants Eligible for Support

#### **Diversity**

Enter the percent of entrants with a disability and the percent from under-represented racial and ethnic groups for the following:

- New Entrants to the Program
- New Entrants Eligible for Support

#### **8.7.1.4 Summary of Counts and Characteristics**

Select the **Summary** tab to display a summary for predoctoral applicants and entrants. The summary displays the means across all years for the counts and characteristics.

To edit this information, refer to the above section of this topic.

#### **8.7.2 Postdoctoral Applicant and Entrant Counts and Characteristics (Revision)**

For each Academic Year, update the *Applicant and Entrant Counts and Characteristics* appropriately. Use the **Edit** buttons provided at the bottom of each table to enter your data. These buttons open up the fields on each table. Enter the data and select the **Save** buttons to save it. Or select **Cancel** to exit editing without saving the changes.

Prepare Research Training Dataset (RTD) for Revision

RTD

4K12HD999999-20 UCLA Child Health Research Career Development Award

PD/PI

Berry, Chuck

2016 - 2017

2015 - 2016

2014 - 2015

2013 - 2014

2012 - 2013

Summary

Postdoctoral Applicant and Entrant Counts and Characteristics ?

+ Open All Sections

Counts: Degree Types

	Total Applicant Pool	Applicants Eligible for Support	New Entrants to the Program	New Entrants Eligible for Support	New Entrants Appointed to this Grant
PhDs					
MDs					
Dual-Degree Holders					
Other Degree Holders					
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

Edit Counts

+ Characteristics: Publications

+ Characteristics: Prior Institutions

+ Characteristics: Diversity

### 8.7.2.1 Counts table

For PhDs, MDs, dual-degree holders, and other degree holders, update the following information:

- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support

### 8.7.2.2 Characteristics

The following tables exist for Characteristics:

## Publications

Enter the mean, lowest, and highest number of publications as well as the mean, lowest, and highest number of first author publications for the following:

- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support

## Prior Institutions

Use the **Characteristics: Research Experience** section to search and select an institution. Start typing in the Institution field. Select the appropriate institution from the drop-down list. Once the institution is selected and displayed on the table, enter a numeric value in the **New Entrants to the Program** and/or **New Entrants Eligible for Support** fields. Select the **Add Prior Institution** link in the **Action** column.

Use the **Edit** and **Remove** links to modify or remove this data.

- New Entrants to the Program
- New Entrants Eligible for Support

## Diversity

Enter the percent of entrants with a disability and the percent from under-represented racial and ethnic groups for the following:

- New Entrants to the Program
- New Entrants Eligible for Support

### 8.7.2.3 Summary of Counts and Characteristics

Select the **Summary** tab to display a summary for postdoctoral applicants and entrants. The summary displays the means across all years for the counts and characteristics.

To edit this information, refer to the above section of this topic.

## 8.8 Appointments (Revision)

Displays the training positions awarded and appointed, separately within two tables.



Prepare Research Training Dataset (RTD) for Revision

RTD

1K99MH999999-01 FOXP2-Regulated Signaling Pathways Critical for Higher Cognitive Functions

PD/PI

Estaire, Fred

Appointments ?

Training Positions Awarded

					Sum of Budget Years
Predoctoral Awarded	0	0	0	0	0
Postdoctoral Awarded	0	0	0	0	0
Short-Term Awarded	0	0	0	0	0

Training Positions Appointed

					Sum of Budget Years
Predoctoral Appointed					
Predoc Dual Degree					
Predoc Diverse Backgrounds					
Postdoctoral Appointed					
Postdoc MD or Equivalent					
Postdoc PhD or Equivalent					
Postdoc DDS, DVM, Other					
Postdoc Dual Degree					
Postdoc Diverse Backgrounds					
Short-Term Appointed					
Short-Term Diverse Backgrounds					

Edit Appointments

### 8.8.1 Training Positions Awarded

The **Training Positions Awarded** table shows the number of awarded Predoctoral, Postdoctoral, and Short-Term appointments for each budget year. The last column of the table shows the sum of each appointment over all budget years.

This information is read-only.

### 8.8.2 Training Positions Appointed

The **Training Positions Appointed** table shows the number of appointed training positions for each budget year. The last column of the table shows the sum of each appointment over all budget years. Training positions include:

- Predoctoral Appointed
- Predoc Dual Degree
- Predoc Diverse Backgrounds
- Postdoctoral Appointed
- Postdoc MD or Equivalent
- Postdoc PhD or Equivalent
- Postdoc DDS, DVM, Other
- Postdoc Dual Degree
- Postdoc Diverse Backgrounds
- Short-Term Appointed
- Short-Term Diverse Backgrounds

Use the **Edit Appointments** button to open the table fields for editing. After updating the fields, select the **Save Appointments** button to save the information.

### 8.9 Preview PDF (Revision)

Select the **Preview PDF** link to open save, and/or print the training tables. An *In Progress* watermark will be printed on the *Training Table* PDF until the RTD is finalized.

### 8.10 Finalize RTD (Revision)

Certain users have the ability to finalize the RTD for a training grant. Finalized RTDs are marked as *Final* and cannot be edited.

To finalize an RTD

1. Select the **Finalize RTD** link from the **RTD** links on the left side of the screen.

A confirmation message warns: *Are you sure you want to finalized this RTD? Once finalized, the RTD cannot be edited?*

**IMPORTANT:** Once you finalize, the RTD cannot be edited. Select the **No** button if you do not wish to finalize.

2. Select the **Yes** button to finalize the RTD.

xTRACT generates a PDF version of the training tables without the *In Progress* watermark, updates the status of the RTD to *Final*, and locks the RTD for editing.

You will have the option to view the finalized PDF at any time on the *Search New RTDs* screen and unfinalize the RTD if needed.

If data are needed to finalize the RPPR RTD, the appropriate error message(s) display as follows:

- *Missing Required Data: Start Date in the In Training Data section is required to finalize the RTD. Please enter the missing data and try again.*
- *Missing Required Data: End Date in the In Training Data section is required to finalize the RTD. Please enter the missing data and try again.*

All trainees must have a start date in the **In Training Data** section. Additionally, trainees with **No** selected for **In Training** status must have an end date.

## 9 Search for Persons

Use the *Search for Person(s)* screen to search for and access trainee information to maintain profiles or prepare research training data sets for revisions, renewals, or progress reports.

Person Name	Commons User ID	Person ID	Commons Institution	Email	Action
Beach, Betty	BEACHB	1234567	UNIVERSITY OF ROCHESTER	eRAStage@mail.nih.gov	<a href="#">Edit</a>
Beach, Sandy	BEACHS	7654321	UNIVERSITY OF ROCHESTER	eRAStage@mail.nih.gov	<a href="#">Edit</a>

1. Select the **Persons** tab to access the *Search for Person(s)* screen.
2. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by checking the **Search for persons who have a Commons affiliation with my institution** box.

---

**NOTE:** You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

---

All records matching the entered search criteria display in the **Person(s)** section of the screen. If no programs meet the entered criteria, the following message displays: *Nothing found to display*.

The matching records are presented in a table and include the following related information:

- **Person Name**
- **Commons User ID**
- **Person ID**
- **Commons Institution**
- **Email**
- **Action**

Depending on your role, you may see the **Edit** or **View** link in the **Action** column. The **Edit** link allows you to access the *xTRACT Person Profile* for editing, while the **View** link provides read-only access. For more information on maintaining a person's profile, refer to the topic titled [xTRACT Person Profile on Page 179](#).

---

**NOTE:** After searching for persons, the **create a new xTRACT person record here** link becomes available. Select this button to access the *Create xTRACT Person* screen. Refer to the topic titled [Create xTRACT Person on Page 184](#) more information.

---

## 9.1 xTRACT Person Profile

### 9.1.1 Accessing the Person Profile

1. Select the **Persons** tab to access the *Search for Person(s)* screen.
2. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by checking the **Search for persons who have a Commons affiliation with my institution** box.

---

**NOTE:** You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

---

All records matching the entered search criteria display in the **Person(s)** section of the screen. If no programs meet the entered criteria, the following message displays: *Nothing found to display*.

The matching records are presented in a table and include the following related information:

- **Person Name**
- **Commons User ID**
- **Person ID**
- **Commons Institution**
- **Email**
- **Action**

---

**NOTE:** After searching for persons, the **create a new xTRACT person record here** link becomes available. Select this button to access the *Create xTRACT Person* screen. Refer to the topic titled [Create xTRACT Person on Page 184](#) more information.

---

3. Select the **Edit** link for the specific person profile being modified.

The *xTRACT Person Profile* screens displays for the selected person. Person Data, Sources of Support, Degrees, and Employment can all be maintained in this profile.

The screenshot shows the 'Person Profile' page for 'Boop, Betty'. At the top right is a link '[+ Open All Sections]'. The main section is 'Person Data', which contains a table with the following information:

Full Name	Boop, Betty
Commons User ID	BETTYBOOP_ED1
Email	eRAStage@mail.nih.gov
Primary Institution Affiliation in Commons	DAN'S INSTITUTION

Below the table is an 'Edit' button. Underneath the 'Person Data' section are three expandable sections: 'Sources of Support', 'Degrees', and 'Employment', each with a plus icon and a gear icon.

### 9.1.2 Person Data

Use the **View** link in the **Person Data** panel of the *xTRACT Person Profile* to display the following information:

- **Full Name**
- **Commons User ID**
- **Email**
- **Primary Institution Affiliation in Commons**

Use the **Edit** links to open the fields for editing. Commons User ID cannot be edited.

### 9.1.3 Sources of Support

---

**NOTE:** This section applies to pre-doc and and post-doc trainees only.

---

Sources of support, both within and outside of NIH, can be maintained in this section. Use the View button on the collapsed panel to display the information.

**IMPORTANT:** You must first select the **Edit** button to open the fields for editing.

#### NIH Sources of Support

Includes the NIH Grant number, Project Title, Period of Support.

To add additional NIH or Other Agency support:

1. Select the **Add a Funding Source** button to display fields for editing.
2. Select the search icon next to **Funding Source** to open query fields.
  - a. Enter search criteria in the fields.
  - b. Select the **Search Funding Sources** button.
  - c. From the list, select the funding source by clicking the appropriate **Select** link in the **Action** column.
3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of this person's involvement.
4. Select an option from the **Role** during funding drop-down.
5. Select **Save**.
6. Repeat the search to add more.

Use the **Edit** and **Delete** links to update or remove the funding source as necessary.

#### Other Sources of Support

Includes Funding Source, Support Type, Project Number, Project Role, and Award Start

Date.

To add additional support:

1. Select the **Add Another Source** button to display fields for editing.

Search for support or create new funding source:

To search:

- a. Select the magnifying glass icon next to the **Funding Source** field.
- b. Search for support entering the parameters given and selecting **Search Funding Sources** button.
- c. From the result list, click the **Select** link from the **Action** column for the correct project.

---

**NOTE:** You can edit this information using the **Edit** link before selecting.

---

To create:

- a. Select the magnifying glass icon next to the **Funding Source** field.
  - b. Select the **Create New Funding Source** button.
  - c. Update the fields. Required fields show a red asterisk (\*).
  - d. Select **Save**.
  - e. Select the created source from the results list, by clicking the **Select** link.
2. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
  3. Select an option from the **Role during funding** drop-down.
  4. Enter the **Other role description** if *Other* was selected for **Role during funding**.
  5. Select **Save**.
  6. Repeat the search to add more.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary.

#### 9.1.4 Degrees

Click on the collapsed panel to display degree details. xTRACT displays a list of completed degrees and associated data in reverse chronological order, with incomplete degrees following.

The **Source** of degrees is displayed as read-only as *xTRACT* (meaning that the degree was added to the person in xTRACT) or as *Commons Profile* (meaning that the degree is from the Commons Personal Profile of the person).

Select the **Edit** button to open the fields for editing.



To add a degree:

1. Select the **Add Another Degree** button.
2. Update the fields:
  - **Degree:** Select from the list
  - **Other Degree Text**
  - **Degree Date:** Enter in MM/YYYYY format
  - **Terminal Degree:** Select the **Yes** or **No** radio button as appropriate. When the **Yes** button is selected, the terminal degree indicator (*This is your terminal degree.*) displays next to the degree details in the view.
  - **Degree Status:** Select Completed or In Progress, as appropriate
  - **Degree Institution:** Enter the institution name, one institution per degree. You search for an institution by selecting the magnifying glass search icon.
3. Select the **Save This Degree** button to save your changes.
4. Repeat for any additional degrees.

Use the **Edit** and **Delete** links in the **Action** column to update or remove degree information as necessary. Degrees with *Commons Profile* as a **Source** cannot be deleted.

### 9.1.5 Employment

Click on the collapsed panel to display information about post-training employment positions. The employment positions are categorized as follows:

- Primary Position
- Current Positions
- Past Positions

The **Source** of positions is displayed as read-only as *xTRACT* (meaning the position was added or updated for the person in xTRACT) or as *Commons Profile* (meaning the position is from the Commons Personal Profile of the person).

Select the **Edit** button for the appropriate position type to open the fields for editing.

To add employment:

1. Select the **Add Employment** button.
2. Provide the following information:
  - **Faculty Teaching Position:** Select from the drop-down.
    - Professor; Associate Professor; Assistant Professor; Instructor; Other

- **Academic Administrative Position:** Select from the drop-down.
    - President; Vice President; Dean; Assistant or Associate Dean; Chairperson of Department (or Director); Other
  - **Primary Employment Indicator:** Select the **Yes** or **No**.
  - **Full Time Employment Indicator:** Select **Full-Time** or **Part-Time**
  - **Employment Position**
  - **Institution:** Enter the institution or select the icon to open a search box
  - **Primary Department of Position:** Enter the department or select the icon to open a search box
  - **Start Date:** Select a date in MM/YYYY format.
  - **End Date:** Select a date MM/YYYY format.
3. Select the **Save** button to save your changes.
  4. Repeat to add another.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary. Positions with a **Source** of *Commons Profile* cannot be deleted.

## 9.2 Create xTRACT Person

In order to create an xTRACT person, you must [first perform a search](#) to verify that the person record does not already exist. Verify that the results of the search – displayed in the **Person(s)** table – do not include the person you are creating.

To continue creating the xTRACT person, follow the steps below.

1. Enter the person data in the designated fields.
  - **Prefix:** Select an option from the list.
  - **First Name** (required)
  - **Middle Name**
  - **Last Name** (required)
  - **Suffix:** Select an option from the list.
  - **Email Address** (required)
2. Select the **Save** button to save the changes.

*You can cancel the action at any time without saving changes by selecting the **Cancel** button.*

Create xTRACT Person

\* Required Fields

Prefix

-- Select --

\* First Name

Middle Name

\* Last Name

Suffix

-- Select --

Email Address

Save

Cancel

After saving, the screen updates to show the addition in the **Person(s)** table.

Use the **Edit** link to edit the *xTRACT Person Profile*. Refer to the topic titled *xTRACT Person Profile on Page 179* for more information.

## 10 Institution Data

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Select the **Institution Data** tab to display options form maintaining Institution Information. Refer to the related topic for more information on the following:

- Maintain Programs
- Maintain Funding Sources
- Upload Funding Sources

### 10.1 Search for Programs at the Institution

To access the *Programs* screen, select the **Maintain Programs** link under the **Institution Information** section of the *Institution Data* screen.

To search for a program:

1. Select the **Maintain Programs** link under the **Institution Information** section of screen to display the *Programs* screen's fields.

If there are no programs at your institution, the *Programs* screen displays with the following message: *There are no programs defined yet for your organization. Use the Create Program to start defining programs.*

If there are programs at your institution, the *Programs* screen displays the programs in a table and include the following related information:

- **Program Name**
- **Program Description**
- **Action**

Besides listing the programs the *Programs* screen also displays the following message: *Looking for a Program but don't see it listed? You can also create one.*

Programs		
Looking for a Program but don't see it listed? You can also <a href="#">create one</a> .		
Showing 1 - 2 of total 2		
Program Name	Program Description	Action
123 ----waldenstrom macroglobulinemia	Testing people with waldenstrom macroglobulinemia	<a href="#">Edit</a>
Test 1 - waldenstrom macroglobulinemia	Testing people who have survived waldenstrom macroglobulinemia 18 years or more	<a href="#">Edit</a>

---

**NOTE:** The *Programs* screen also displays, the **create one** link. Select this link to access the *Create Program* screen fields. Refer to the topic titled *Create a Program at Institution on Page 187* more information.

---

Use the **Edit** link for a specific program to modify that program.

### 10.1.1 Create a Program at Institution

Access the *Create Program* screen by:

- Selecting the **Create Program** link on the *Programs* screen

1. Enter the **Program Name**. This field is required and has a limit of 60 characters.
2. *Optional:* Enter a description of the program in the **Program Description** field. This is an optional field and can be left blank. This field has a limit of 250 characters.
3. Select the **Submit** button to save the changes.

*You can cancel the action at any time without saving changes by selecting the **Cancel** button.*

### 10.1.2 Update Programs

Use the Update Programs screen to edit a program's name and description. To access this screen, select the **Edit** link after successfully [searching for the program](#).

1. Update the name of the program in the **Program Name** field and/or the description of the program in the **Program Description** field as necessary.
2. Select the **Submit** button to save the changes.

*You can cancel the action at any time without saving changes by selecting the **Cancel** button.*

After submitting, the *Update Program* screen shows the following message: *Your program (name) was saved successfully. Click here to edit it.*

**Edit Program** ?

\* Required field(s)

\* Program Name

123 ---waldenstrom macroglobulinemia

Program Description

Testing people with waldenstrom macroglobulinemia

Save Cancel

## 10.2 Maintain Funding Sources

Select the **Maintain Funding Sources** link under the **Institution Information** section of the *Institution Data* screen.

To search for a funding source:

1. Enter and/or select the appropriate search criteria in the *Maintain Funding Sources* fields:
  - **Type of Funding**
  - **Funding Source Number**
  - **Organization**
  - **Start Date**
  - **End Date**
  - **Project Title**

2. Select the **Search Funding Sources** button.

You can use the **Clear** button to remove the entered search criteria and start over.

Matching records display beneath the search fields. The information includes **Project Title**; **Type**; **Number**; **Organization**; **Project Dates** (if available); and available **Action** links.

The screenshot shows a web application interface for maintaining non-NIH funding sources. On the left is a sidebar with a dropdown menu labeled 'Institution Information' and three links: 'Maintain Programs', 'Maintain Funding Sources', and 'Upload Funding Sources'. The main content area is titled 'Maintain Non-NIH Funding Sources' with a help icon. Below the title is a 'Search Criteria' section. It contains two columns of search fields. The left column has 'Type of Funding Source' (a dropdown menu with options: Fellowship, Other, Research Assistantship), 'Funding Source Number' (a text input field), and 'Start Date (mm/yyyy or yyyy)' (a text input field). The right column has 'Organization' (a dropdown menu with options: Foundation (Fdn), National Science Foundation (NSF), Non-US (Non-US)), 'Project Title' (a text input field), and 'End Date (mm/yyyy or yyyy)' (a text input field). Below these fields is a note: 'You can perform a wildcard search by using the "%" character, for example: abcd% or %abcd% or ab%cd%'. At the bottom of the search criteria section are two buttons: 'Search Funding Sources' and 'Clear'.

Select the **Edit** button to modify a specific funding source or click the **create a new funding source here** link. See [Edit Funding Source](#) or [Create Funding Source](#) topic respectively.



**Maintain Non-NIH Funding Sources**

+ Search Criteria

+ Funding Sources matching your search criteria

Show 10 entries Search:

Project Title	Type	Number	Organization	Project Dates	Action
8SJDFG	Scholarship	FSFSFG	Other	01/2016 - 01/2016	<a href="#">Edit</a>
Test 16	Scholarship	o	University	01/2016 - 01/2016	<a href="#">Edit</a>
Test 3	Scholarship	b	Non-US	01/2016 - 01/2016	<a href="#">Edit</a>
Test 30	Scholarship	DFHFHJSDF	Other	01/2016 - 01/2016	<a href="#">Edit</a>

Showing 1 to 4 of 4 entries Previous 1 Next

Looking for a Funding Source but don't see it in your search results? You can [create a new funding source here.](#)

### 10.2.1 Create Funding Source

Access the *Create Non-NIH Funding Source* screen by selecting the **create a new funding source here** link on the *Maintain Non-NIH Funding Sources* screen.

To add the funding source:

- Enter the following fields as appropriate, taking note of the required fields marked with an asterisk (\*).
  - Project Title** (required): Enter the project title for the funding source.
  - Type of Funding Source** (required): Select the appropriate type of funding source from the list: Fellowship; Other; Research Assistantship; Research Grant; Scholarship; Teaching Assistantship; Training Grant
  - Funding Source Number**: Enter a funding source number as needed.
  - Organization**: Select the appropriate choice from the list: NIH; Foundation; National Science Foundation (NSF); Non-US ; Other; Other Federal; University
  - Start Date (mm/yyyy or yyyy)**: Enter as MM/YYYY or YYYY
  - End Date (mm/yyyy or yyyy)**: Enter as MM/YYYY or YYYY
  - Description**: Enter a description of the source as needed. This field has a maximum limit of 200 characters.

2. Select the **Save** button to save the information.

**Create Non-NIH Funding Source**

\* Required field(s)

\* **Type of Funding Source**

Scholarship  
Teaching Assistantship  
Training Grant

**Organization**

Other (Other)  
Other Federal (Other Fed)  
University (Univ)

\* **Project Title**

Sample Funding Source

**Funding Source Number**

1234567

**Start Date (mm/yyyy or yyyy)**

04/2016

**End Date (mm/yyyy or yyyy)**

06/2017

**Description**

This is my sample funding source description.

**Save** **Cancel**

## 10.2.2 Edit Funding Source

xTRACT users with the proper privileges can maintain an institution's funding sources for use in research training data sets for progress reports, revisions, or renewals on existing training grants or for new applications.

The *Edit Funding Source* screen is used to maintain the funding source data.

To access this screen, select the **Edit** link after successfully [searching for the funding source](#).

To maintain a funding source:

1. Complete the fields in the **Edit Funding Source** section.
  - **Project Title** (required): Enter the project title for the funding source.
  - **Type of Funding Source** (required): Select the appropriate type of funding source from the list: Fellowship; Other; Research Assistantship; Research Grant; Scholarship; Teaching Assistantship; Training Grant

- **Funding Source Number:** Enter a funding source number as needed.
- **Organization:** Select the appropriate choice from the list: NIH; Foundation; National Science Foundation (NSF); Non-US ; Other; Other Federal; University
- **Start Date (mm/yyyy or yyyy):** Enter as MM/YYYY or YYYY
- **End Date (mm/yyyy or yyyy):** Enter as MM/YYYY or YYYY
- **Description:** Enter a description of the source as needed. This field has a maximum limit of 200 characters.

2. Select the **Save** button to save the information.

**Edit Non-NIH Funding Source** [X]

\* Required field(s)

<b>* Type of Funding Source</b>	<b>Organization</b>
<div>Fellowship Other Research Assistantship</div>	<div>Foundation (Fdn) National Science Foundation (NSF) Non-US (Non-US)</div>
<b>* Project Title</b>	<b>Funding Source Number</b>
<div>Sample Funding Source</div>	<div>1234567</div>
<b>Start Date (mm/yyyy or yyyy)</b>	<b>End Date (mm/yyyy or yyyy)</b>
<div>04/2016</div>	<div>06/2017</div>
<b>Description</b>	
<div>This is my sample funding source description.</div>	

**Save** **Cancel**

### 10.3 Upload Funding Sources

Funding sources can be uploaded.

1. Select the **Upload Funding Sources** link under the **Institution Information** section of the *Institution Data* screen.

The *Upload Funding Sources* screen displays with notes regarding uploading your funding source data.

xTRACT Info New Applications Training Grants Persons Institution Data

Institution Information ▾

- Maintain Programs
- Maintain Funding Sources
- Upload Funding Sources

### Upload Funding Sources

Please note the following when uploading your funding source data:

- The file format must match the tab-delimited format in the template that is available for download. [Click here](#) for instructions on how to convert an Excel File to the Correct Upload Format
- Including the column headers is optional. However, they must match those in the template.
- The tab-delimited template format includes the following required columns: Funding Source Project Title, Type of Funding Source, Funding Source Number, Funding Source Organization, Funding Source Start Date, Funding Source End Date, Funding Source Description
- The Funding Source Project Title and Type of Funding Source are required for each uploaded funding source. The other columns are optional.
- The Funding Source Project Title must be 200 characters or less.
- The Type of Funding Source must be one of "F" for Fellowship, "OTH" for Other, "RA" for Research Assistantship, "RG" for Research Grant, "S" for Scholarship, "TA" for Teaching Assistantship, or "TG" for Training Grant.
- If it is provided, the Funding Source Number must be 20 characters or less.
- If it is provided, the Funding Source Organization must be one of "NIH" for NIH, "FDN" for Foundation, "NSF" for National Science Foundation, "NUS" for Non-US, "OTH" for Other, "OTHF" for Other Federal, or "UNIV" for University.
- If the Funding Source Start Date and/or Funding Source End Date are provided, each must be in the form of mm/yyyy or yyyy.
- If the Funding Source Description is provided, it must be 200 characters or less.
- The data will be validated upon upload of the file and the results will be presented on the screen.
- If a file upload fails for any reason such as incorrect data or incorrect format, none of the records will be saved in IMPACII. You will need to make the corrections and re-upload the file.
- Data is committed to the database only after all rows in the upload file pass validation.

Don't have an input file, but would like to download a template that illustrates the file format? [You can download a template here.](#)

2. To use a template, click the **You can download a template here** link.
  - a. Edit, Save and upload the template.
3. To upload your file, click the **Browse** button to upload your funding source.